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**Metin ESGIN**

OPEN ACCESS

Istanbul, 2025



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**Metin ESGIN**

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Istanbul, 2025

**(citehub).<sup>1</sup>**  
Reference Managers & Citation Styles



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## ABOUT THE AUTHOR

Born in Istanbul, the author is officially registered in Balıkesir, Turkey. He completed his secondary education at Şehit Mehmet Gönenc Super High School, achieving good academic performance. He then earned a bachelor's degree in Information and Document Management from Marmara University, where his undergraduate thesis, titled "Movie Archive Database Program," won third place in a department-wide competition.

Continuing his academic journey, he obtained a master's degree in the same field from Istanbul University, with a thesis titled "Analysis, Comparison, and Possible Developments of Frequently Used Web-Based Bibliographic Management Programs." Currently, he is pursuing a Ph.D. in the same department at Istanbul University. At the same time, he is enrolled in a second undergraduate program in Management Information Systems through the Open Education Faculty at Anadolu University.

With over 13 years of professional experience, the author has held various positions. His roles include work at Istanbul University, the Central Library of Istanbul University-Cerrahpasa, the Faculty of Law Library at Erzincan Binali Yıldırım University, the General Directorate of Boyner Büyük Magazacılık in the BSSD/Sales/End of Series Unit, and as an Assistant Manager in the Export Department of Avrasya Foreign Trade.

His current work focuses on bibliography management, open course systems, librarianship, and information technologies. He is proficient in various programming languages and software tools, including Java, MySQL, MS-SQL, HTML, CSS, Figma, Premiere Pro, Audition, Photoshop, Canva, Canvas LMS, Google Workspace, MS Visio, FileMaker Pro, Yordam, SirsiDynix, Joomla, WordPress, EndNote, Mendeley, Zotero, and WoS InCites. He is good at both English and Ottoman Turkish.

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## ABSTRACT

*Mendeley Desktop* is a bibliography management software primarily used by graduate and doctoral students, academic staff, researchers and development (R&D) workers, writers, and anyone who requires citations and references in their work. Its key features include saving references, backing up data, importing a reference library from other bibliography management software, and organizing references and related files. *Mendeley Desktop* seamlessly integrates with MS Word and other similar word processing software, simplifying the citation and bibliography processes. This book serves as a guide to help users maximize the end-user features of *Mendeley Desktop*, enabling them to quickly learn how to effectively utilize the software.

## FOREWORD

Bibliography management software, also known as a reference manager, assists with citation and bibliography tasks during the writing process in any field.

These tools collect important details about references, such as the title, author, publisher, journal, volume, issue, publication year, publication location, edition, editor, translator, page count, ISSN/ISBN, DOI, PMID, keywords, URL, and PDF, all with just a few clicks.

Citations and bibliographies can be created quickly and easily, and users can switch between citation styles in an instant.

Additionally, bibliography managers allow users to share their reference libraries with others and back them up in the cloud. They offer features for reading, annotating, and taking notes on PDFs, as well as the ability to rename PDF files and organize them into folders based on citation information. The software can also synchronize with specified folders on the computer, facilitating academic research and collaboration. For these features and more, users can visit [mendeley.com](http://mendeley.com)

This book provides practical and comprehensive instructions on how to use these processes effectively. For those interested in bibliography management software, the following resources are available:

- How to use *Mendeley Reference Manager* desktop
- How to use *EndNote* desktop
- How to use *Zotero* desktop
- A review and comparison of commonly used web-based bibliographic management programs, along with suggested improvements.

Alternatively, you can access all these resources and more at [www.citehub.net](http://www.citehub.net)

The bibliography at the end of this book includes detailed information about the listed books and other related resources.

Enjoy your reading!

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## ABBREVIATIONS LIST

<b>.doc/docx</b>	: The file type used by Microsoft Word.
<b>APA</b>	: American Psychological Association
<b>CSL</b>	: Citation Style Language
<b>DOI</b>	: Digital Object Identifier
<b>IDs</b>	: Identifiers
<b>ISBN</b>	: International Standard Book Number
<b>ISSN</b>	: International Standard Serial Number
<b>MIE</b>	: Mendeley Institutional Edition
<b>MLA</b>	: Modern Language Association
<b>.bib</b>	: Bibtex database file
<b>ODT</b>	: Open Document Text
<b>PDF</b>	: Portable Document Format
<b>PMID</b>	: PubMed Identifier
<b>RIS</b>	: Research Information System
<b>RTF</b>	: Rich Text Format
<b>SYNC</b>	: Synchronization
<b>TXT</b>	: Text
<b>TUBİTAK</b>	: The Scientific and Technological Research Council of Türkiye
<b>URL</b>	: Uniform Resource Locator
<b>WoS</b>	: Web of Science
<b>XML</b>	: eXtensible Markup Language

## www.citehub.net

All the information in this book and more is provided free of charge through a learning management system, organized in a systematic and special order via [www.citehub.net](http://www.citehub.net). Additionally, the content on [citehub.net](http://citehub.net) includes tutorials, videos, screenshots, explanations of menu options, software specifications, frequently asked questions, and literature related to bibliography management software. This website is also a valuable resource for thesis, book, and article writers, as well as anyone who uses citations and bibliographies in their work. The [www.citehub.net](http://www.citehub.net) website enables users to track their progress in bibliography management software training and find answers to exam questions, making the learning process more manageable and enjoyable.

## CITATION STYLES

The most critical issue when using bibliography management software is the citation style. This system file formats the citation information of a publication for use in citations, footnotes, and bibliographies. Once the preferred citation style is activated in the software, it generates the desired citation and bibliography without the need for corrections in abbreviations, punctuation, or order. Even if a new citation is created after the bibliography is established, the program will place the new citation in the appropriate location within the bibliography.

However, if the citation style isn't selected correctly in the software, it won't produce the expected citations and bibliography. Instructions on how to activate the citation and bibliography style in the software can be found under the section titled "d) Choosing, Finding, and Editing a Citation Style". Creating a citation style system file from scratch or modifying an existing one requires experience. Therefore, it is often easier to find an existing file from citation style repositories and activate it within the software. If the file is already formatted in the required style (for example, APA7), using the software becomes straightforward; if not, it can be challenging.

Publishing houses, journal editors, graduate school boards, and faculty members can facilitate the use of reference management software by adopting commonly used citation styles for authors and students.

## I. ENTRANCE TO MENDELEY DESKTOP

*Mendeley Desktop* and *Mendeley Reference Manager*, developed by the American company *Elsevier*, provide software solutions for managing citations, bibliographies, and references. Both programs cater to users' needs for citation and reference management (Esgin, 2019, p. 81).

This guide offers comprehensive information on using *Mendeley Desktop*. Please note that it does not cover [mendeley.com](https://mendeley.com), *Reference Manager*, or other web services in detail. Once you become proficient with *Mendeley Desktop*, you will find it easier to navigate *Mendeley Web* and other *Mendeley* products, as they share similar functionalities.

**Important Note:** *Mendeley Desktop* is the predecessor to *Mendeley Reference Manager*, meaning that these two programs are distinct from one another (service.elsevier.com, 2024).

Now, let's begin with the instructions on how to use *Mendeley Desktop*.

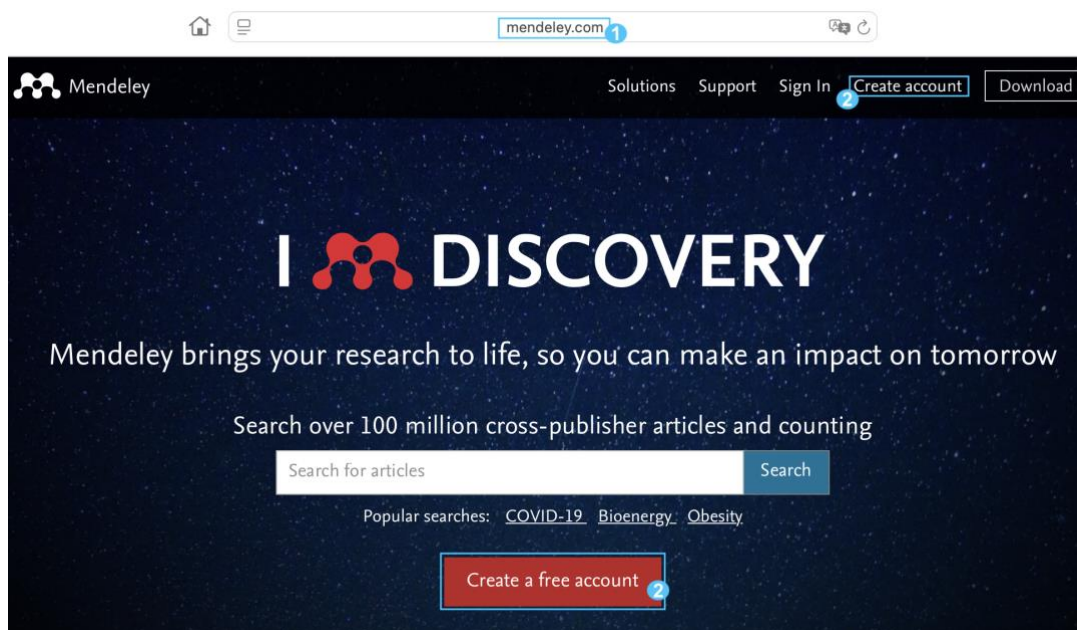
### a) Usage Options

#### i) Free Account

To use *Mendeley*, you must first create an account on the *Mendeley* website. Creating an account is free.

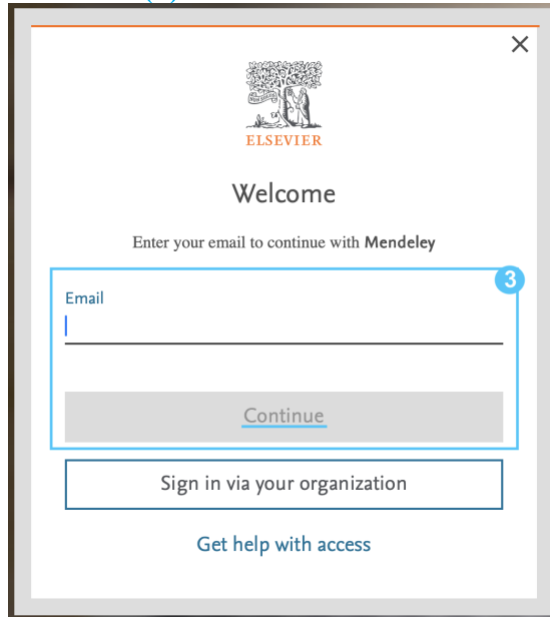
Steps to create a membership account (5 steps):

**Steps 1, 2-** Open the **mendeley.com** websites (1), click on either **Create account** (2) or **Create a free account** (2).



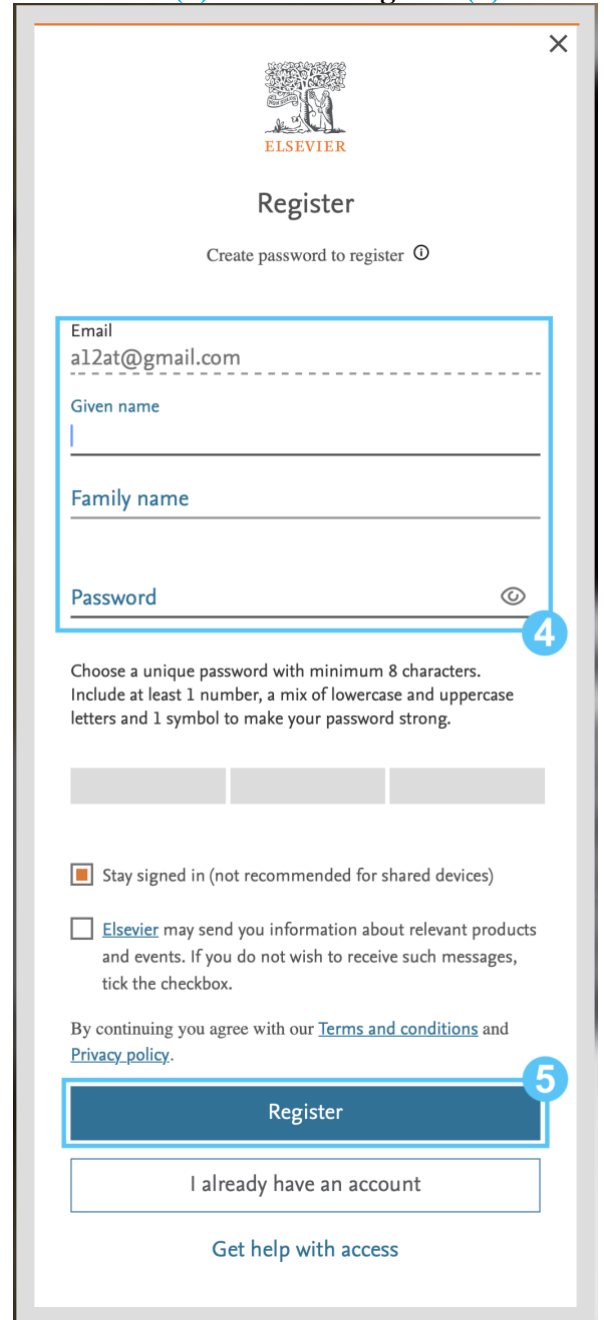
Screenshot 1 – Creating Free Account - 1

**Step 3-)** Enter your email address and click **Continue (3)**.



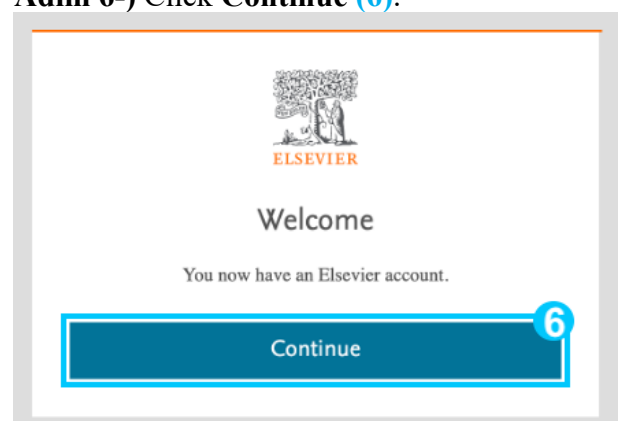
Screenshot 2 – Creating Free Account - 2

**Steps 4, 5-)** Fill in your membership information (4) and click **Register (5)**.



Screenshot 2 - Creating Free Account - 3

**Adim 6-)** Click **Continue (6)**.

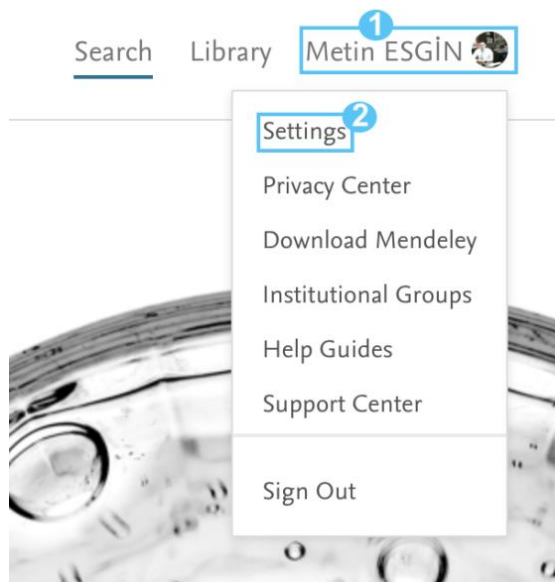


Screenshot 3 - Creating Free Account - 4

A free account has been created.

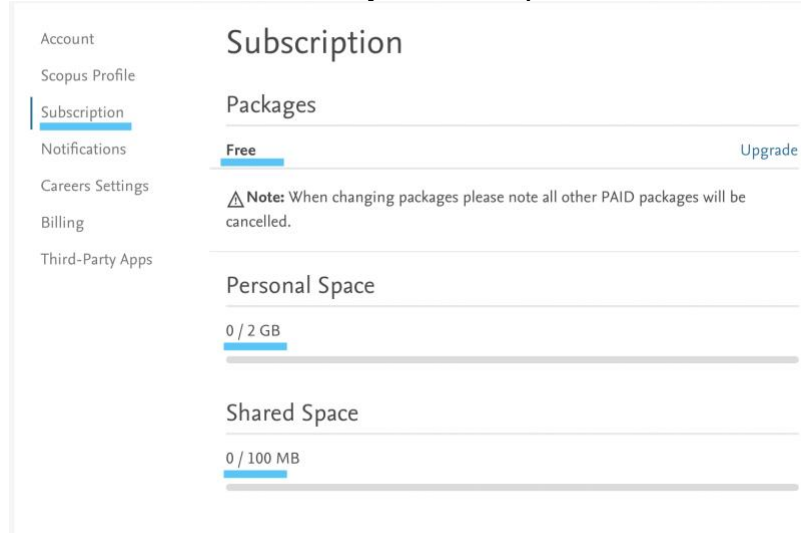
To view your account information:

Go to Account Name **(1)** > **Settings (2)**



Screenshot 4 - View Account Information - 1

You can view the details of your subscription under the **Subscription** option.



Screenshot 5 - View Account Information - 2

If you sign up for a free account while using a university's internet network, your *Mendeley Institutional Edition (MIE)* subscription will be automatically created. You can enjoy the benefits of this subscription even if you don't use an institutional email address. To become an *MIE* subscriber, simply log in to mendeley.com from the university network after creating your account. Your university/institution must be registered under the institutional Mendeley agreement for this to be possible. You can check with your library to see if the agreement is in place.

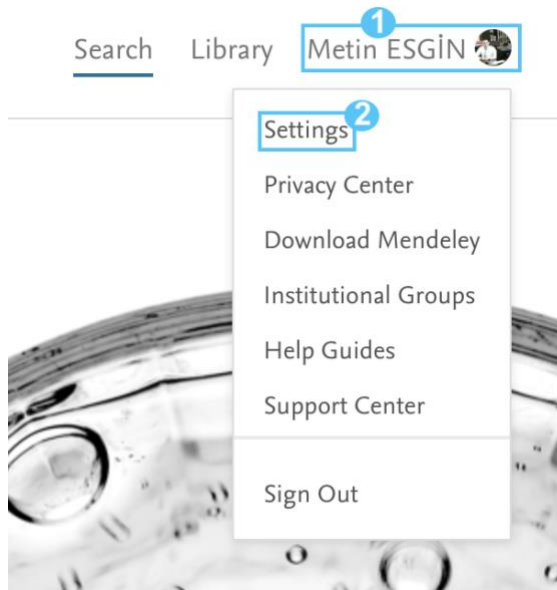


## ii) Mendeley Institutional Edition (MIE) Subscription

The *Mendeley Institutional Edition (MIE)*, which offers extended rights, was purchased by TUBITAK for all private and public universities in Türkiye (Esgin, 2019). Users can become *MIE* members by completing the “[i\) Free Account](#)” transaction after logging into the campus network once with their member account, even if they do not use an institutional email address to register. *MIE* members receive 100GB of cloud storage and access to additional features outlined in Screenshot-8. (TUBITAK, 2024).

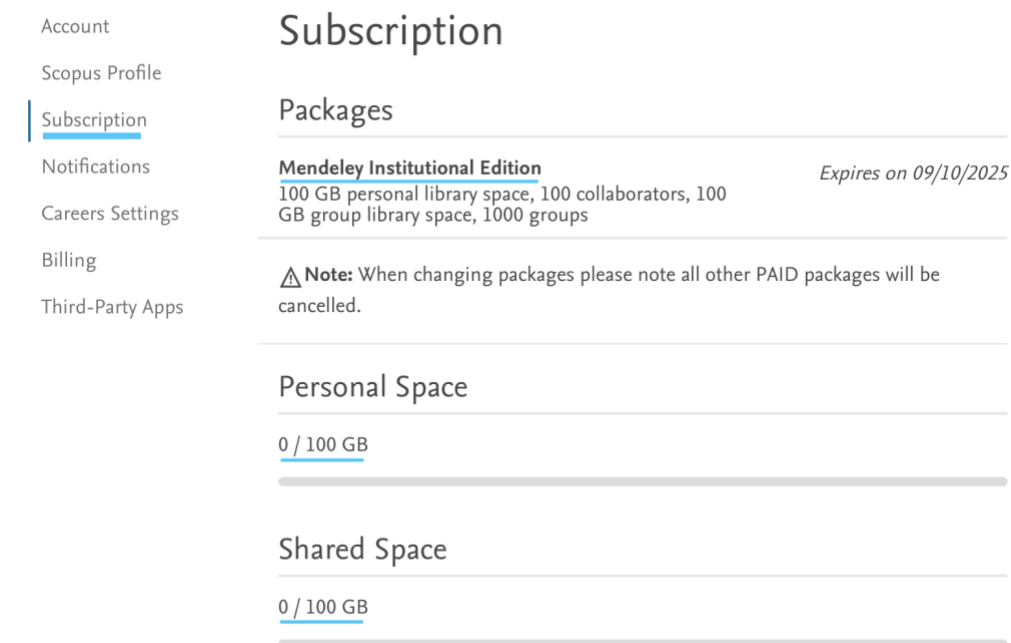
To access the details of a user account:

### Steps 1, 2-) Account Name (1) > Settings (2)



Screenshot 6 - Viewing Mendeley Institutional Edition Subscription Information - 1

The subscription details of the account can be found under the **Subscription** option.

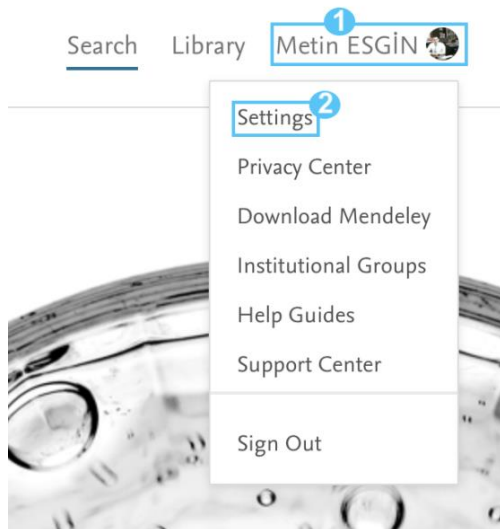


Screenshot 7 - Viewing Mendeley Institutional Edition Subscription Information - 2

### 1) Purchasing Cloud Storage

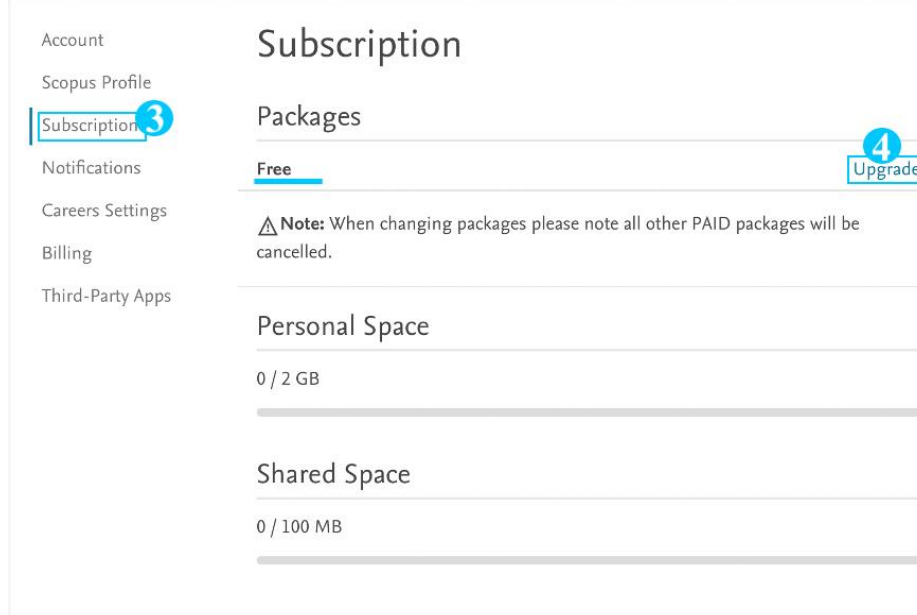
If you are using a free account, there are options available to increase your storage space. To upgrade your storage on the *Mendeley* website, follow these steps:

**Steps 1, 2** Click on your Account Name (1) > Navigate to **Settings** (2)



Screenshot 8 – Purchasing Cloud Storage - 1

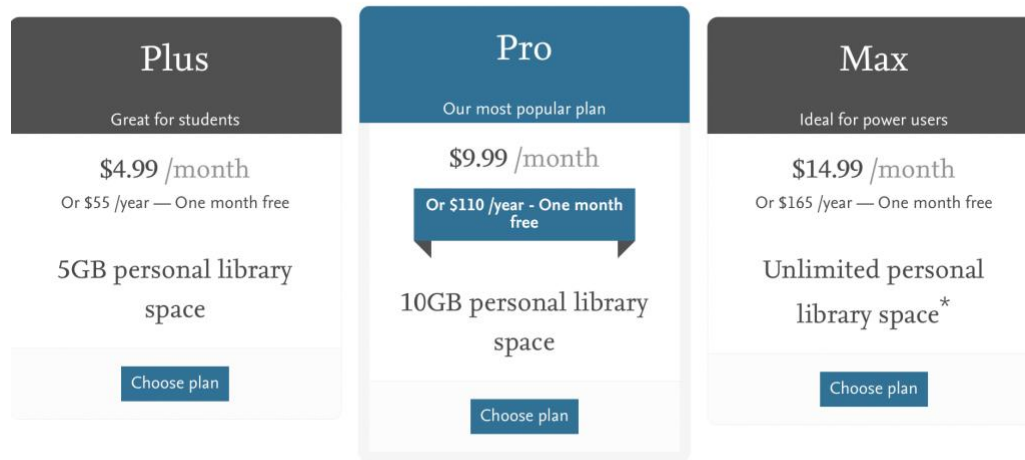
**Steps 3, 4** Select **Subscription** (3) and then click on **Upgrade** (4).



Screenshot 9 - Purchasing Cloud Storage - 2

Choose one of the available cloud storage packages by clicking on "**Choose plan**" (mendeley.com, 2024d).

Pick a plan that's right for you.



We also have a [free plan](#) which gives you 2GB of personal library space

Screenshot 10 - Purchasing Cloud Storage - 3

## b) Installations

### i) Compatible Operation Systems and Word Processors

The software is compatible with Windows, Macintosh, Ubuntu/Debian, Linux as operating systems. However, it is not compatible with macOS devices that have M-series processors.

Additionally, the software is compatible with Microsoft Word and LibreOffice word processing programs (mendeley.com, 2024d).

### ii) Desktop Software Installation

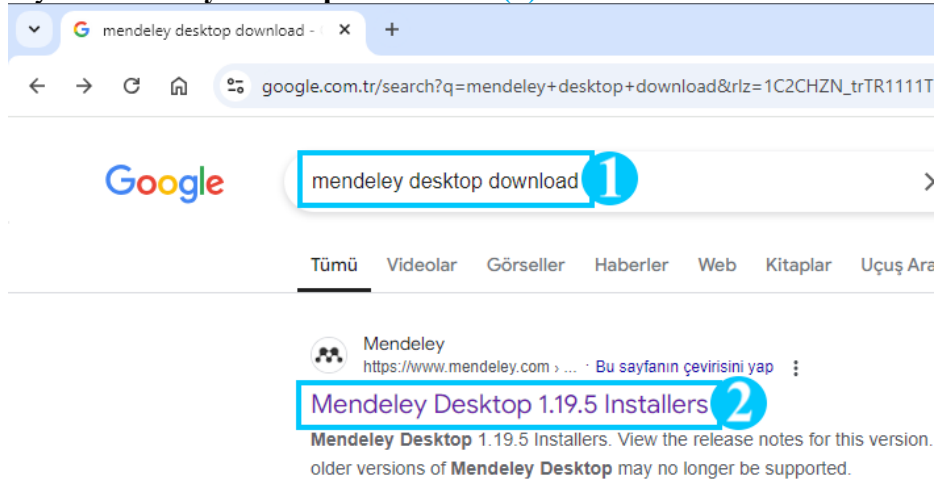
#### 1) How to install Mendeley Desktop?

**Important Note:** *Mendeley Desktop* is the previous version of *Mendeley Reference Manager* software, the two programs are not the same.

The *Mendeley Desktop* program can be easily installed on a computer by following the steps below. To install the software (using Google Chrome and Windows):

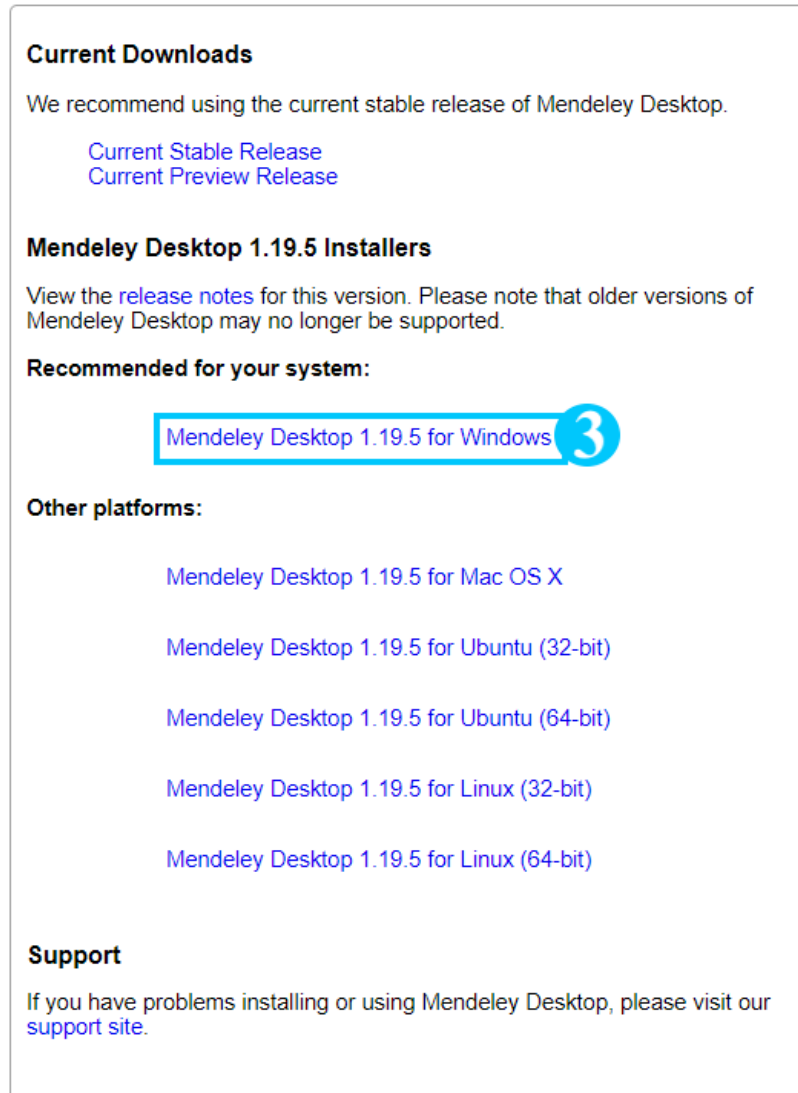
Here are necessary 7 steps:

**Steps 1, 2-) Open Google and search for “mendeley desktop download” (1) Click on the link that says “Mendeley Desktop Installers” (2).**



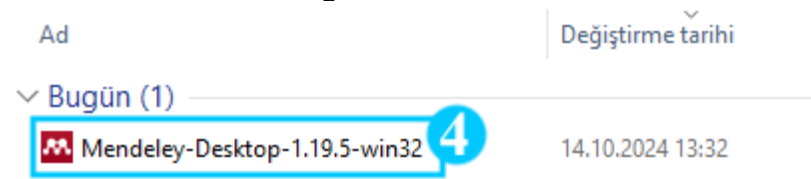
*Screenshot 11 - Mendeley Desktop Installation - 1*

**Step 3-) Select “Mendeley Desktop for Windows” (3).**



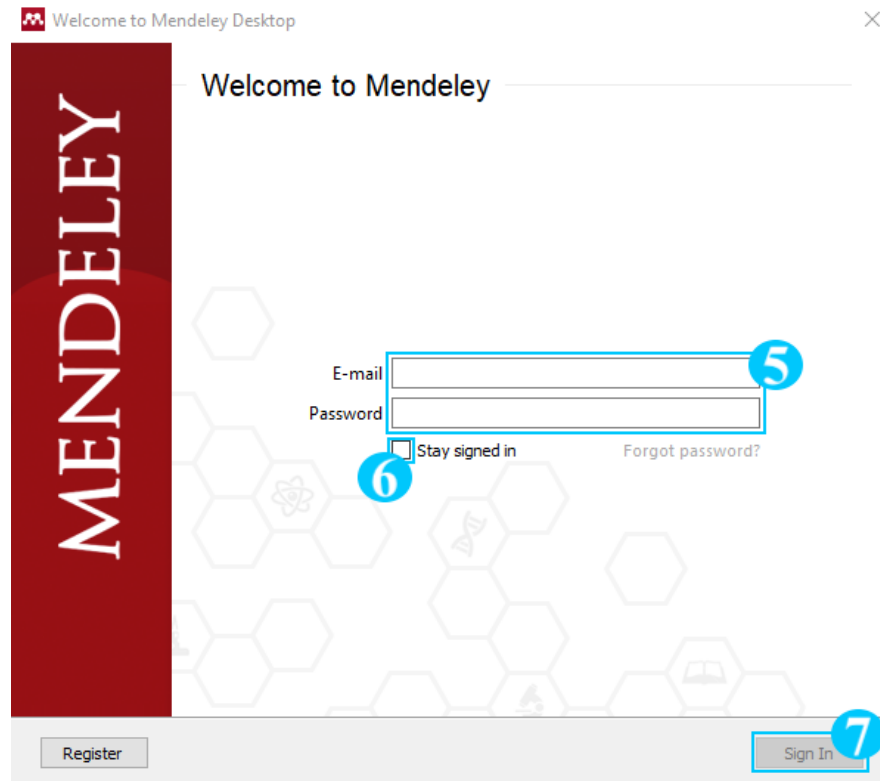
*Screenshot 12 - Mendeley Desktop Installation - 2*

**Step 4-)** Once the download is complete, locate the "**Mendeley-Desktop**" (4) file on your computer and double-click it to begin the installation.



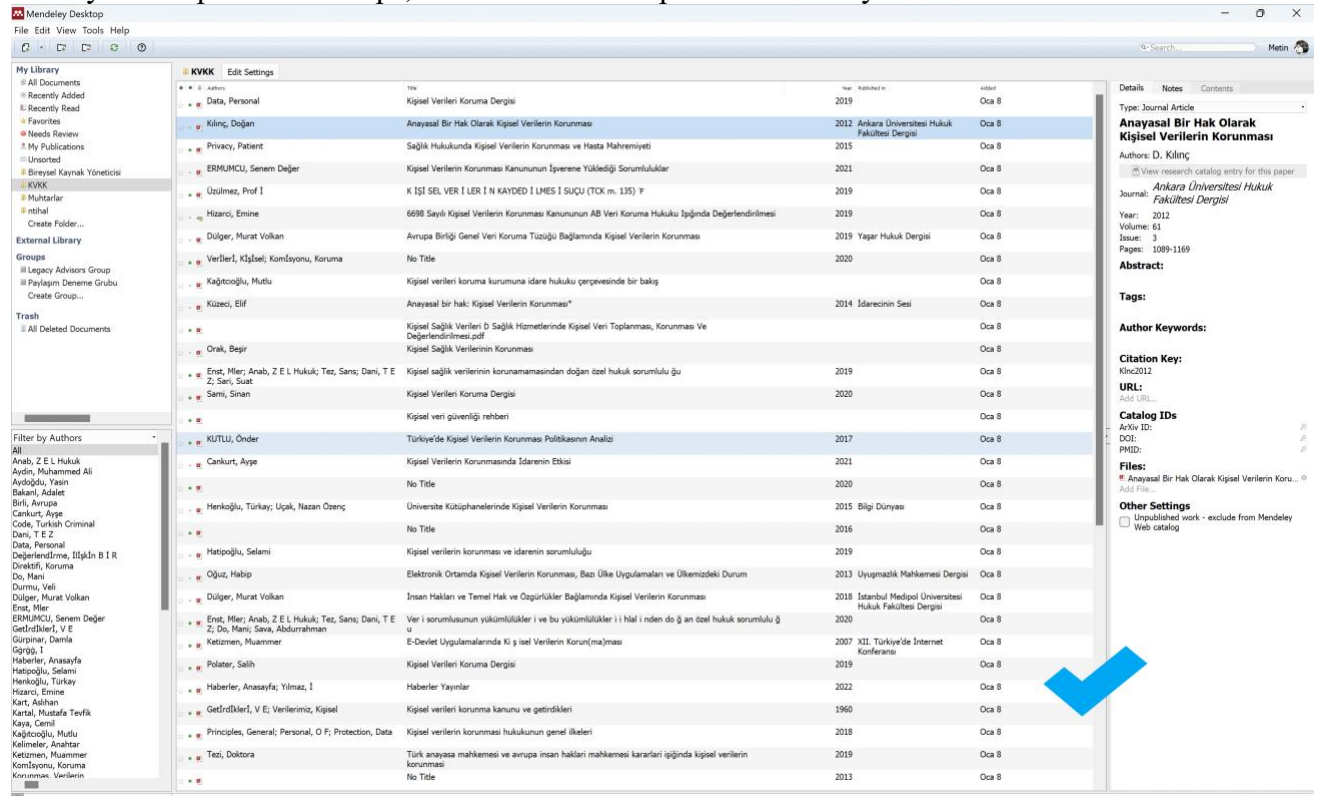
Screenshot 13 - Mendeley Desktop Installation - 3

**Steps 5, 6, 7-)** After the installation is complete, launch the software. The *Mendeley* opening screen will appear. Enter the **email address** and **password** (5) you used to create your account on the [mendeley.com](https://mendeley.com) website, and check the "**Stay signed in**" box (6), and click "**Sign in**" (7).



Screenshot 14 - Mendeley Desktop Installation - 4

Once you complete these steps, the software will open and be ready for use.



Screenshot 15 - Mendeley Desktop Installation - 5

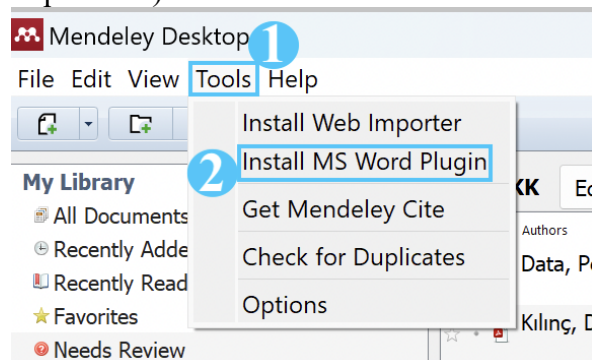
Mendeley Desktop is now successfully installed on your Windows computer.

### I. Installation of MS Word Plugin

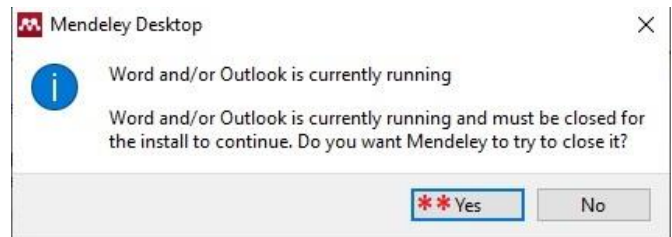
To easily create citations and a bibliography using references saved in your Mendeley Desktop library, you need to install the MS Word plugin.

Here are the necessary 3 steps:

**Steps 1, 2-)** Open the Mendeley Desktop software, and click on **Tools** (1) > then select **Install MS Word Plugin** (2). (If MS Office is currently open, you will be prompted to close it; click "Yes" (\*\*\*) to proceed.)

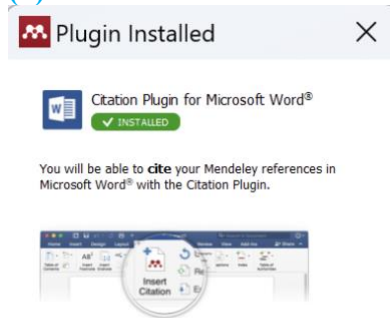


Screenshot 16 - MS Word Plugin Installation - 1

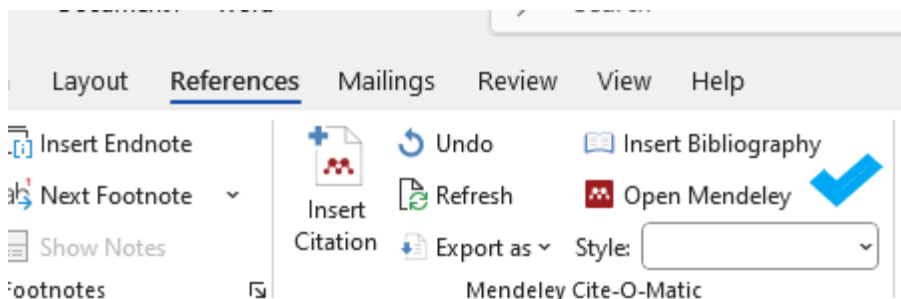


Screenshot 17 - MS Word Plugin Installation - 2

**Step 3-)** A confirmation window will appear, indicating that the installation is complete. Click "**OK**" **(3)** to finish.



Screenshot 18 - MS Word Plugin Installation – 3



Screenshot 19 - MS Word Plugin Installation – 4

The installation of the MS Word plugin is now complete.

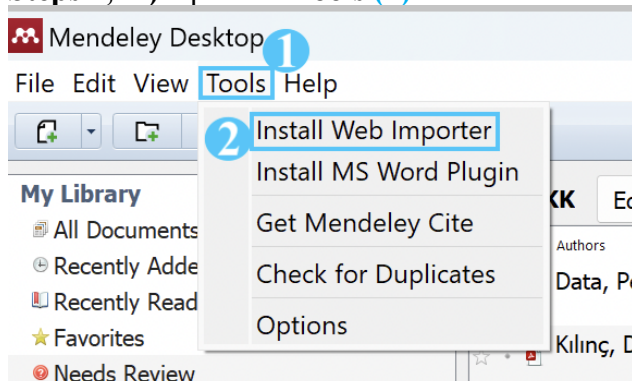
## II. Installation of the Internet Browser Extension

### How to install the Mendeley Web Importer?

To easily save references from websites and databases using your internet browser, you need to install the *Mendeley Web Importer* plugin.

Here are necessary **11** steps:

**Steps 1, 2-)** Open the **Tools** **(1)** menu and select **Install Web Importer** **(2)**.



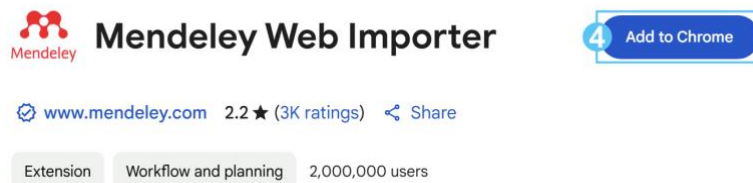
Screenshot 20 - Mendeley Web Importer Installation - 1

**Step 3-)** Visit the *Mendeley* website and click on **Get Web Importer for Chrome (3)**.



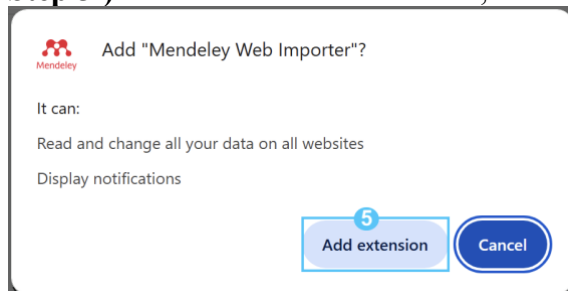
*Screenshot 21 - Mendeley Web Importer Installation - 2*

**Step 4-)** In the chrome webstore click **Add to Chrome (4)**.



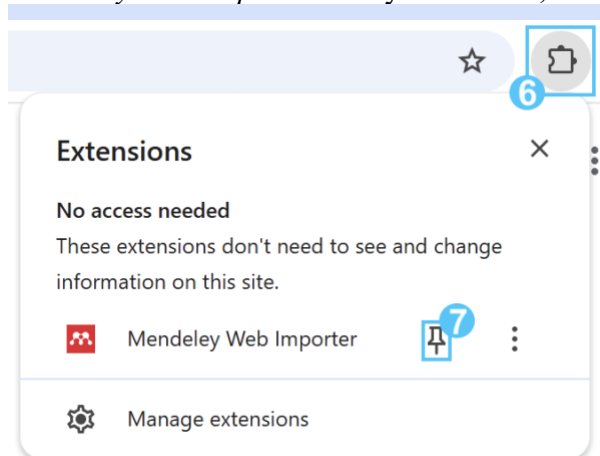
*Screenshot 22 - Mendeley Web Importer Installation - 3*

**Step 5-)** In the confirmation window, click **Add extension (5)**.



*Screenshot 23 - Mendeley Web Importer Installation - 4*

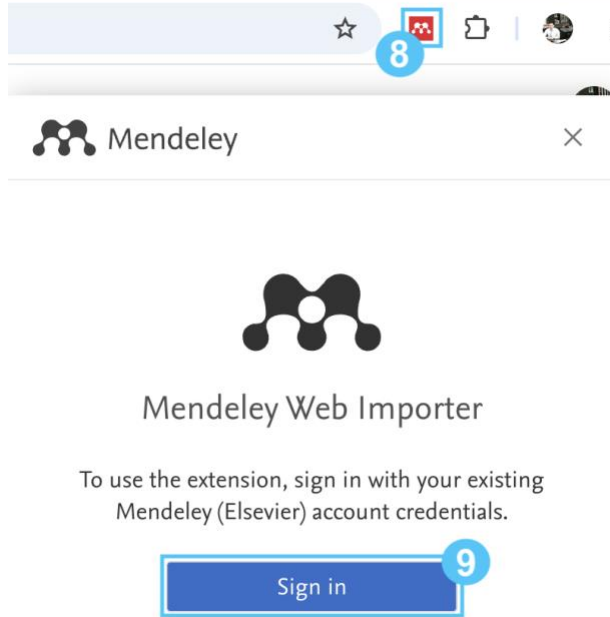
**Steps 6, 7-)** Once the extension is installed, click on the extension's icon **(6)** in Chrome. To make the *Mendeley Web Importer* easily accessible, click the pin icon next to *Mendeley Web Importer (7)*.



*Screenshot 24 - Mendeley Web Importer Installation - 5*

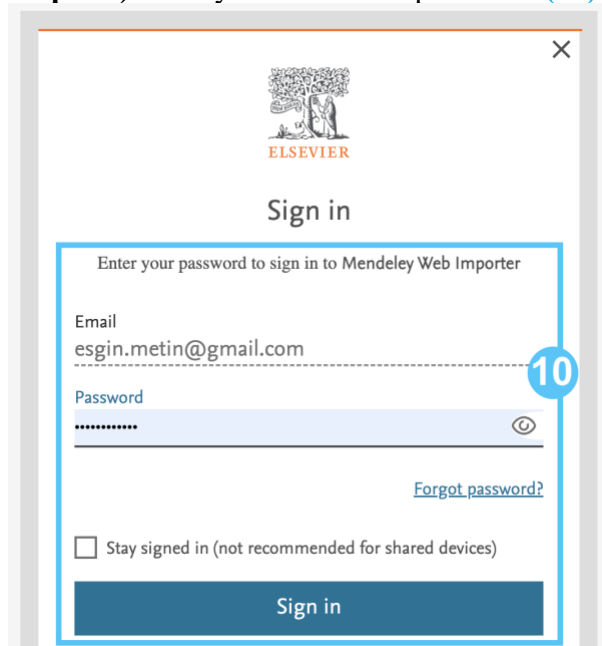


**Steps 8, 9-)** Click on the *Mendeley* extension (8), select **Sign** in (9).

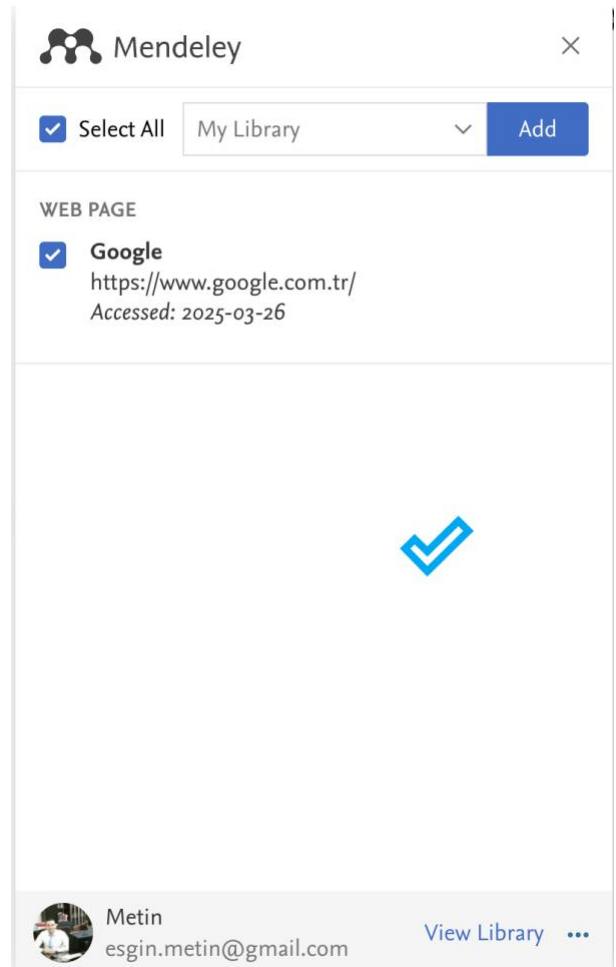


Screenshot 25 - Mendeley Web Importer Installation - 6

**Step 10-)** Enter your email and password (10).



Screenshot 26 - Mendeley Web Importer Installation - 8



Screenshot 27 - Mendeley Web Importer Installation - 9

The *Mendeley Web Importer* extension has been successfully installed for Google Chrome.

### c) Transitioning from Other Software

When switching from a bibliography management software other than *Mendeley*, you can export your registered reference library and save it in *Mendeley Desktop*.

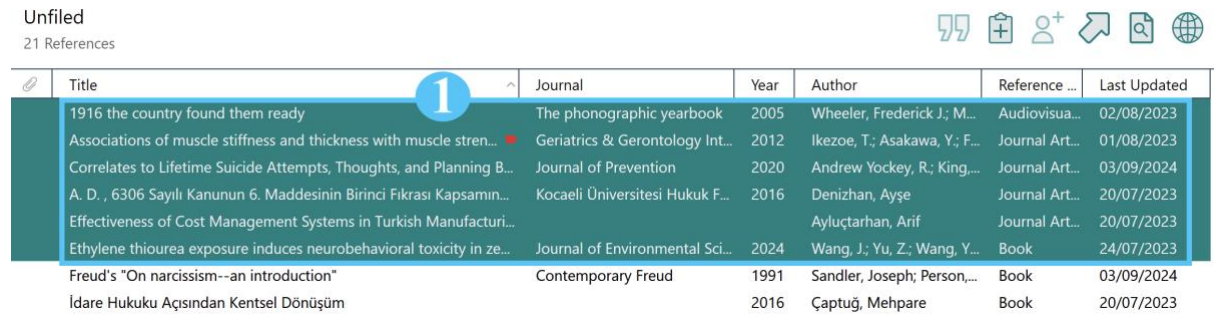
#### i) Moving from EndNote

To transfer your references, you must first export your *EndNote* library and then import it into *Mendeley*.

Here are the steps to export an EndNote library and save it to Mendeley (6+ steps):

**Step 1-)** Select the references you wish to export from your *EndNote21* library using the mouse while holding down the Ctrl key (1).

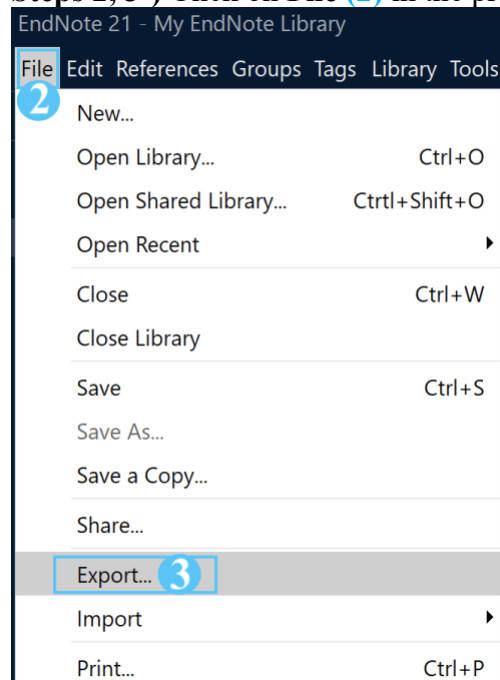
Unfiled  
21 References



Title	Journal	Year	Author	Reference ...	Last Updated
1916 the country found them ready	The phonographic yearbook	2005	Wheeler, Frederick J.; M...	Audiovisua...	02/08/2023
Associations of muscle stiffness and thickness with muscle stren...	Geriatrics & Gerontology Int...	2012	Ikezoe, T.; Asakawa, Y.; F...	Journal Art...	01/08/2023
Correlates to Lifetime Suicide Attempts, Thoughts, and Planning B...	Journal of Prevention	2020	Andrew Yockey, R.; King...	Journal Art...	03/09/2024
A. D. , 6306 Sayılı Kanunun 6. Maddesinin Birinci Fikrasi Kapsamın...	Kocaeli Üniversitesi Hukuk F...	2016	Denizhan, Ayşe	Journal Art...	20/07/2023
Effectiveness of Cost Management Systems in Turkish Manufacturi...			Ayluçtarhan, Arif	Journal Art...	20/07/2023
Ethylene thiourea exposure induces neurobehavioral toxicity in ze...	Journal of Environmental Sci...	2024	Wang, J.; Yu, Z.; Wang, Y...	Book	24/07/2023
Freud's "On narcissism--an introduction"	Contemporary Freud	1991	Sandler, Joseph; Person,...	Book	03/09/2024
İdare Hukuku Açısından Kentsel Dönüşüm		2016	Çaptuğ, Mehpare	Book	20/07/2023

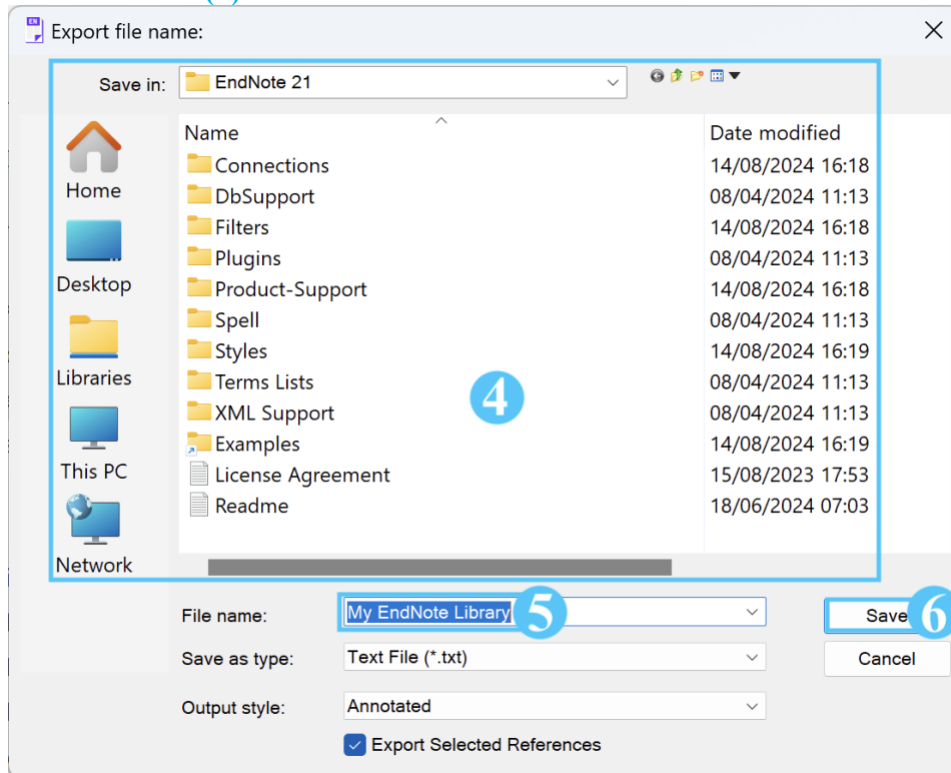
Screenshot 28 - Migrating from EndNote to Mendeley - 1

**Steps 2, 3-)** Click on **File** (2) in the program menu and select **Export** (3).



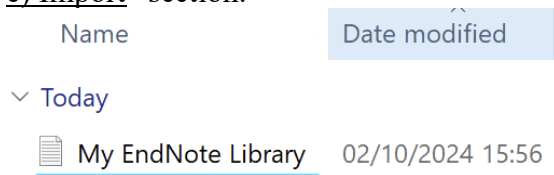
Screenshot 29 - Migrating from EndNote to Mendeley - 2

**Steps 4, 5, 6-)** Choose the location where you want to save the file (4), enter a name for the file (5), and click Save (6).



Screenshot 30 - Migrating from EndNote to Mendeley - 3

After completing these steps, your downloaded file will be ready for import. You can then save the downloaded file to your *Mendeley Desktop* library by following the instructions outlined in the “e) Import” section.



Screenshot 31 - Migrating from EndNote to Mendeley - 4

### ii) Moving from Zotero

To move your library from *Zotero* to *Mendeley*, you first need to export your *Zotero* library and then import it into *Mendeley*.

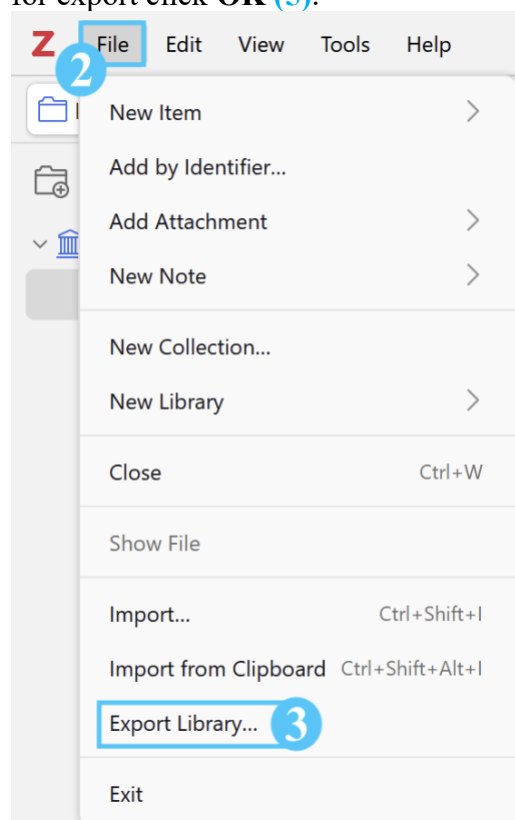
Here are the 7+ steps to follow:

**Step 1-)** Select the references you want to export from your *Zotero Desktop* library by holding the Ctrl key and clicking on each reference. (1)

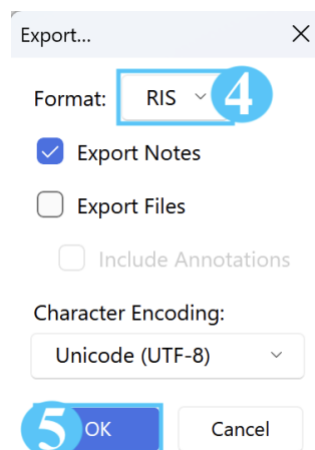
Title	Creator	Year	Publisher
> 1916 the country found them ready	Wheeler e...	2005	Archeophone,
> A rare muscle variation – accessory piriformis muscle	Albert GR...	2023	
> A rare muscle variation – accessory piriformis muscle	Gradev et ...	2018	
A. D. , 6306 Sayılı Kanunun 6. Maddesinin Birinci Fıkr...	Denizhan	2016	
> Associations of muscle stiffness and thickness with m...	Ikezoe et al.	2012	
> Correlates to Lifetime Suicide Attempts, Thoughts, a...	Andrew Y...	2020	
Effectiveness of Cost Management Systems in Turkis...	Ayluçtarhan	1	
> Ethylene thiourea exposure induces neurobehavioral ...	Wang et al.	2024	
> Freud's "On narcissism--an introduction"	Sandler et...	1991	Yale University Press

Screenshot 32 - Migrating from Zotero to Mendeley - 1

**Steps 2, 3, 4, 5-)** Click on **File** in the menu (2) choose **Export Library...** (3) select the **RIS** (4) format for export click **OK** (5).

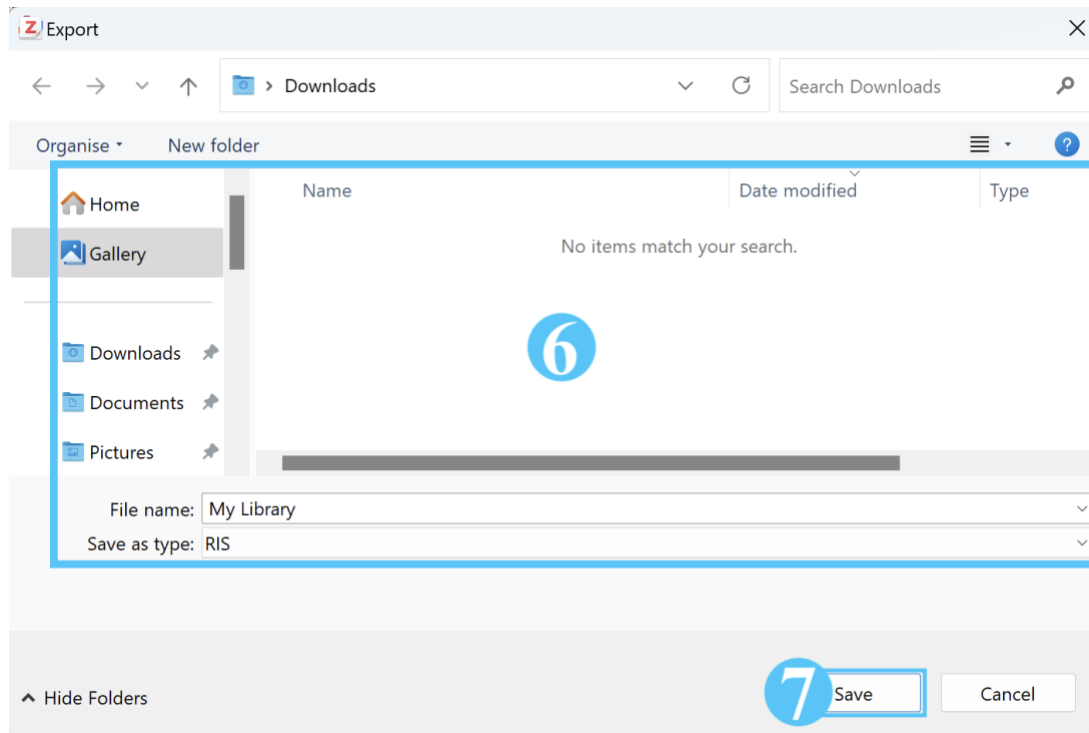


Screenshot 33 - Migrating from Zotero to Mendeley - 2



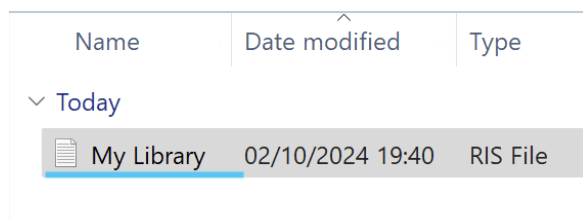
Screenshot 34 - Migrating from Zotero to Mendeley - 3

**Steps 6, 7-)** Choose the location where you want to save the exported file **(6)** and click **Save (7)**.



Screenshot 35 - Migrating from Zotero to Mendeley - 4

Your downloaded file is now ready for import.



Screenshot 36 - Migrating from Zotero to Mendeley - 5

To import it into your *Mendeley Desktop* library, follow the instructions in the “e) Import” section.

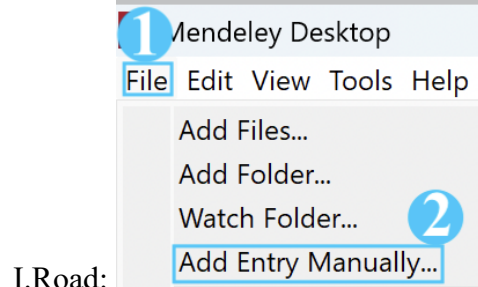
## II. REFERENCE SAVING METHODS

Click to view bibliography samples and see the required data fields they contain.

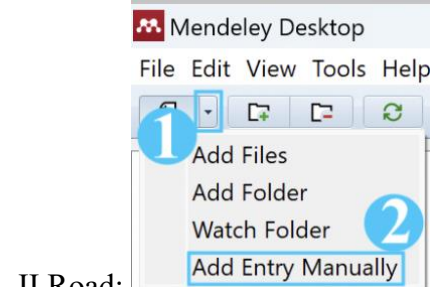
### a) Saving References Manually

References can be saved manually in *Mendeley* by following these 5 steps:

**Steps 1, 2-) Click on the File (1) menu or use the Add (1) shortcut. Select Add Entry Manually (2).**



Screenshot 37 - Manual Reference Entry - 1



II.Road:  
Screenshot 38 - Manual Reference Entry - 2

**Steps 3, 4, 5-)** Choose the appropriate reference type. (3). Enter the necessary information (4). Save the entry by clicking on Save (5).

**New Document**

Type: Journal Article

**Web Tabanlı Bibliyografik Yönetim Programları Üzerine Kısa Bir Değerlendirme**

Authors: M. ESGİN

Journal: *Arşiv Dünyası*

Year: 2019

Volume: 6

Issue: 2

Pages: 179-187

**Abstract:**

Nowadays, bibliographic management programs facilitate scientific study processes where scientific work production increases and references are mostly obtained from online sources. By means of these tools, the identification information of the references can be saved from online sources or files compatible with the programs in one or two processes. The stored reference information can be edited through these programs, the existing references can be stored in synchronization on the web, one-click citations can be generated, the reference style can be changed to another reference style, and similar sources can be found. In this study, the features of the programs are mentioned and explained. The development of technology has added new features to bibliographic management programs. Obtaining information from PDF files and finding similar sources are good example...

**Tags:**

**Author Keywords:**

Bibliyografya; Referans; Atıf; Dipnot; Bibliyografik Yönetim Programları; Kaynakça

**URL:**

<https://dergipark.org.tr/tr/pub/ad/issue/51364/666009>

Add URL...

**Catalog IDs**

ArXiv ID:

DOI:

PMID:

**Files:**

Add File...

**Other Settings**

☐ Unpublished work - exclude from Mendeley Web catalog

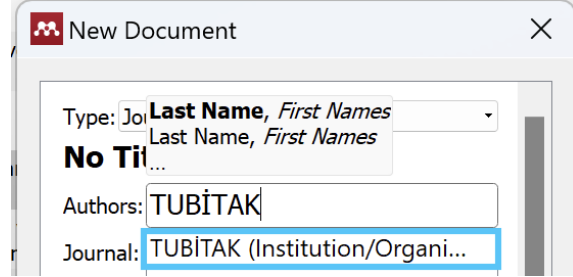
Reset Save Cancel

Screenshot 39 - Manual Reference Entry - 3

Once these steps are completed, the reference will be saved manually.

When writing an author's name, follow these guidelines:

- 1-) If the author is an individual: Start with the surname, followed by the first name, and include a middle name if applicable. (Format: Surname, First Name, Middle Name).
- 2-) For multiple authors: Apply the same format as above, using the Enter key to separate each author's name.
- 3-) If the author is an institution or organization: Write the name of the institution or organization as it is. These steps will ensure proper formatting of author names.

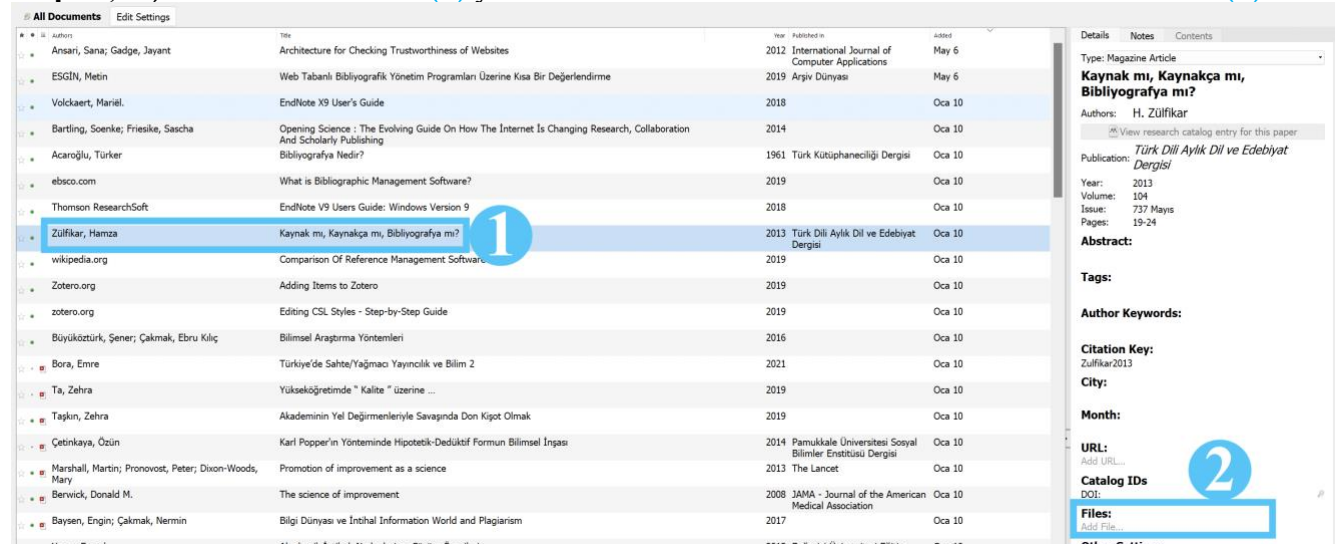


Screenshot 40 - Manual Reference Entry - 4

### i) Adding Files (PDF etc.) to References

To add a PDF file to a reference in your library, follow these 4 steps:

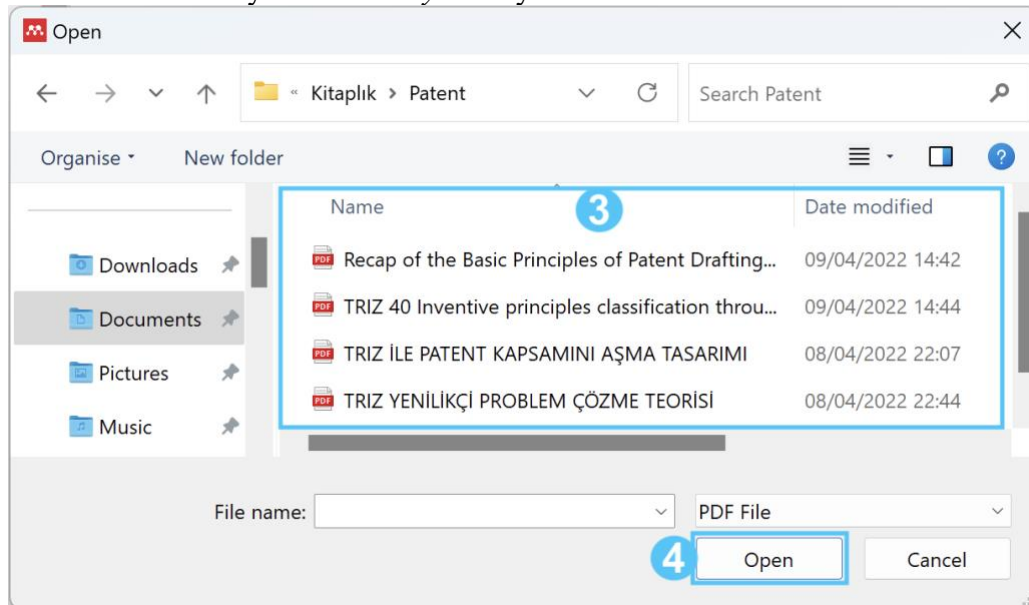
**Steps 1, 2-) Select the reference (1) you want to add the file to. Click on "Files" - "Add File... (2)"**



Screenshot 41 - Adding Files (PDF etc.) to References - 1



**Steps 3, 4-** Choose the PDF file (3) you want to upload. Click **Open** (4) the PDF will now be added to the reference in your *Mendeley* library.



Screenshot 42 - Adding Files (PDF etc.) to References - 2

The PDF will now be attached to the reference in your *Mendeley* library.

## b) Easy Methods

### i) Fast Reference Entry via Identifiers (ISBN, DOI, ArXiv ID, PMID)

You can quickly retrieve and save bibliographic data by entering an ArXiv ID, DOI, or PMID and clicking on the magnifying glass icon. However, it's essential to check the automatically retrieved data for any errors.

Here are the 5 steps for quick reference entry using identifiers:

**Steps 1, 2, 3-)** Enter the **ArXiv ID**, **DOI** or **PMID** (1) and click on the magnifying glass icon next to it (2). The bibliographic data will be displayed. Click **Save** (3).

Screenshot 43 - Fast Reference Entry via Identifiers (ISBN, DOI, ArXiv ID, PMID) - 1

Screenshot 44 - Fast Reference Entry via Identifiers (ISBN, DOI, ArXiv ID, PMID) -

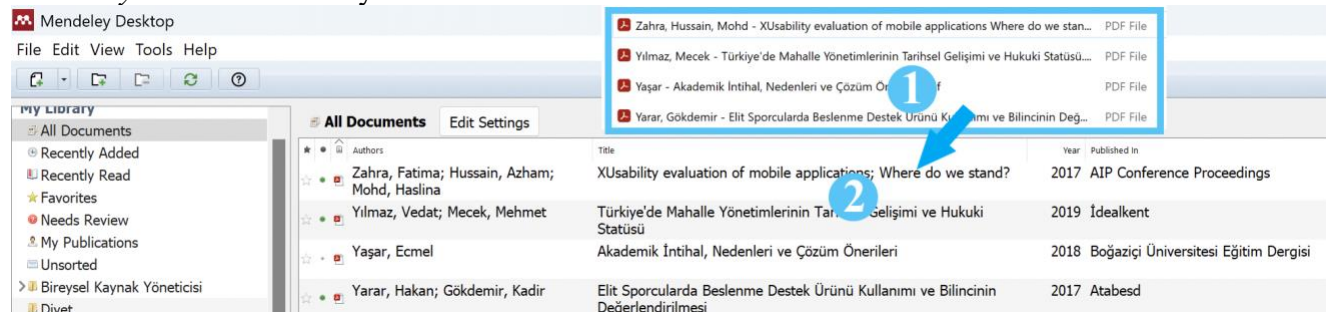
**Steps 4, 5-)** To obtain more detailed information from the *Mendeley Web Catalog*, go to your library and select "**Recently Added**" (4), Right-click on the reference and select **Update Details** (5).

Screenshot 45 - Fast Reference Entry via Identifiers (ISBN, DOI, ArXiv ID, PMID)- 3

By following these steps, you can efficiently enter references using the identifier.

### ii) Fast Entry of PDF Files

To add PDF files to your *Mendeley* library, simply drag and drop the files into the program. *Mendeley* will automatically retrieve and save the citation information from the PDFs.



Screenshot 46 - Fast Entry of PDF Files - 1

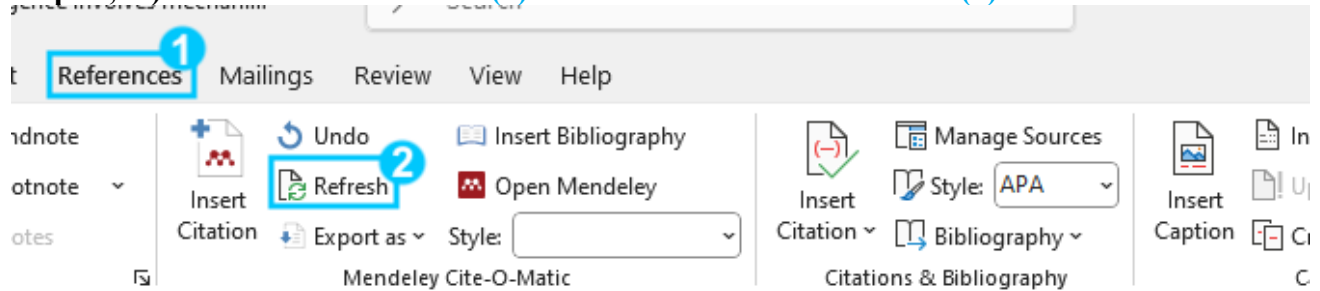
However, it's important to note that there may be errors in the bibliographic data obtained automatically. Therefore, it's advisable to check the accuracy of the bibliographic data.

### iii) Citations in a Word Document

If you have a Microsoft Word document containing citations or a bibliography generated with *Mendeley* and it's from someone else, you can easily save those references to your *Mendeley* library.

Follow these 5 steps:

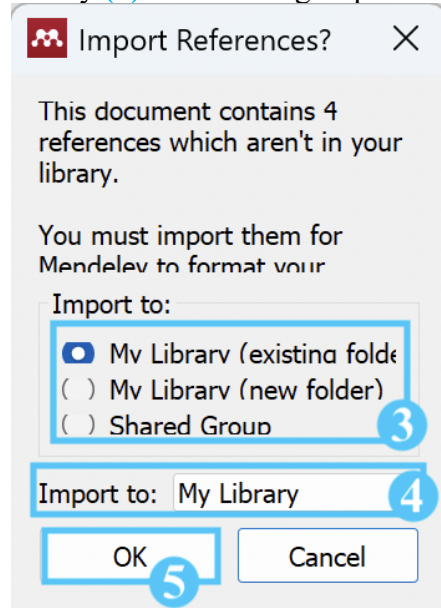
**Steps 1, 2-) Click on the References (1) tab in MS Word. Select Refresh (2).**



Intelligence involves mechanisms, and AI research has discovered how to make computers carry out some of them and not others. If doing a task requires only mechanisms that are well understood today, computer programs can give very impressive performances on these tasks. Such programs should be considered "somewhat intelligent (ESGIN, 2019, p. 89).|

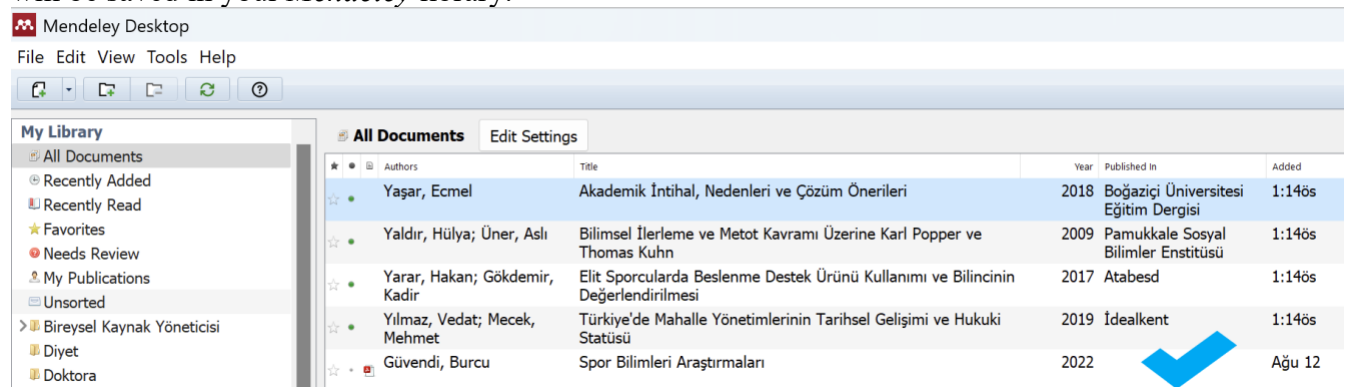
Screenshot 47 - Adding Citations from Word Documents to Mendeley the Easy Way - 1

**Steps 3, 4, 5-)** Choose the group (3) where you want to save the references. Select the appropriate library (4) within that group. Click **OK** (5).



Screenshot 48 - Adding Citations from Word Documents to Mendeley the Easy Way - 2

After completing these steps, the references and bibliographic data from the Word document will be saved in your *Mendeley* library.



Screenshot 49 - Adding Citations from Word Documents to Mendeley the Easy Way - 3

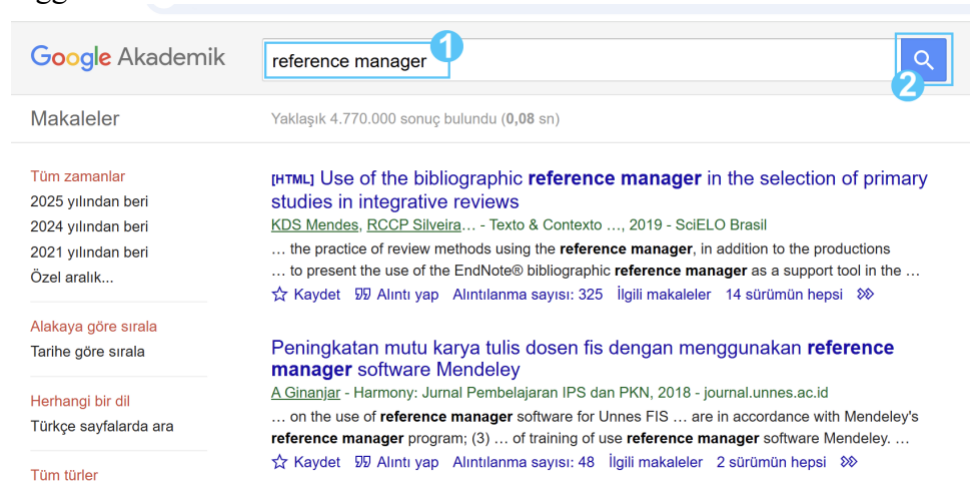
#### iv) Importing References via Internet Browser

##### 1) Mendeley Web Importer

You can save references from online sources, such as websites and databases, to your *Mendeley* library using the *Mendeley Web Importer*. This method is applicable for academic databases like Google Scholar, DergiPark, Web of Science, or Scopus etc.

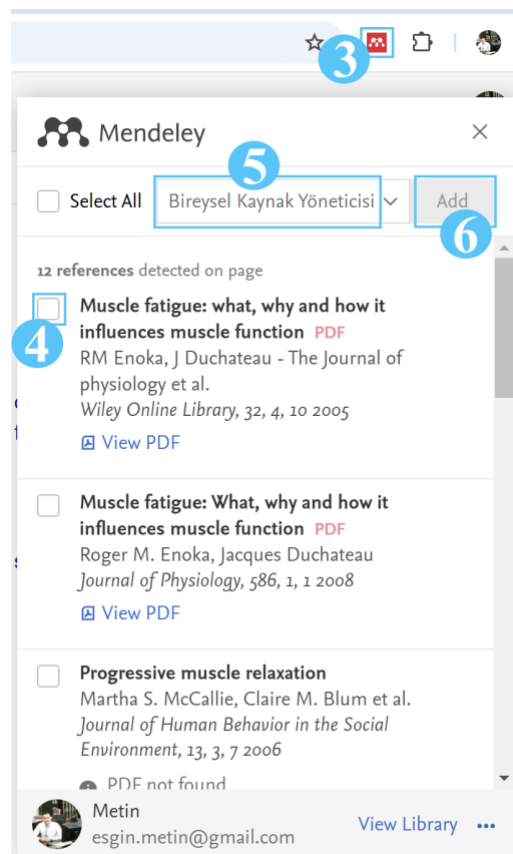
Follow these 7 steps:

**Steps 1, 2-)** Begin by entering a keyword into the relevant database (1) and perform a search (2). Ensure that the 1) Mendeley Web Importer is installed on your internet browser and that you are logged in.



Screenshot 50 - Import with Mendeley Web Importer - 1

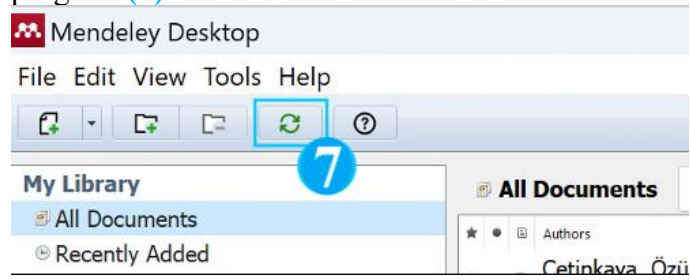
**Steps 3, 4, 5, 6-)** Click on the *Mendeley Web Importer* add-on (3). In the add-on window, select the checkboxes next to the resources you want to save (4). Then, choose the desired section of your library where you'd like to store these resources (5). Click on **Add** (6).



Screenshot 51 - Import with Mendeley Web Importer - 2

The selected resources will now be added to your *Mendeley Web* library.

**Step 7-)** Finally, click **Sync** to save the resources from your online library to the *Mendeley Desktop* program (7).



Screenshot 52 - Import with Mendeley Web Importer - 3

Once you have completed these steps, your sources will be saved in the *Mendeley Desktop* library.

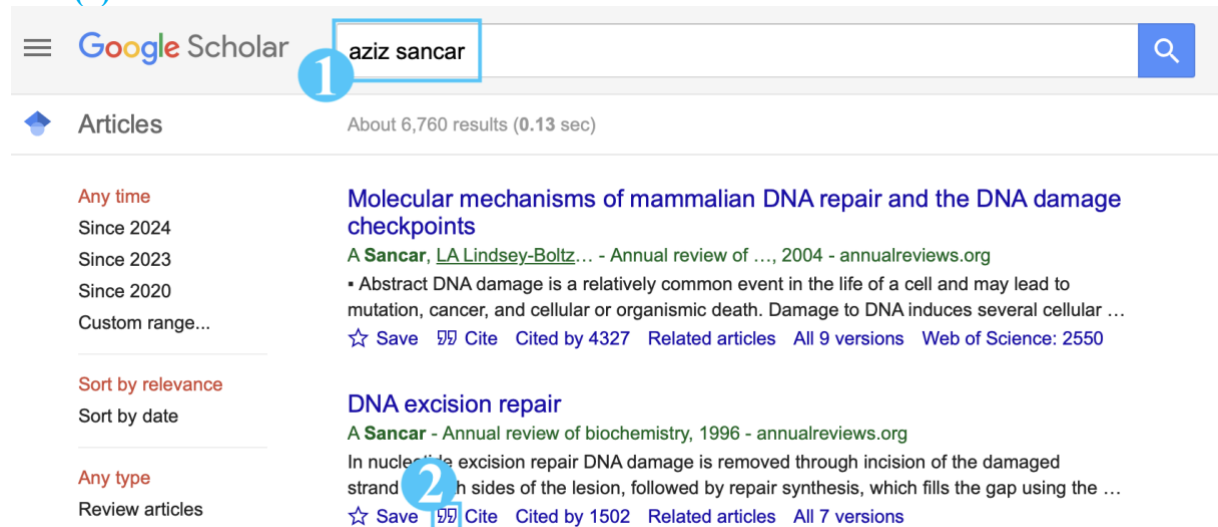
### c) Academic Databases

#### i) Google Scholar

References obtained from *Google Scholar* can be saved to your computer and then imported into Mendeley.

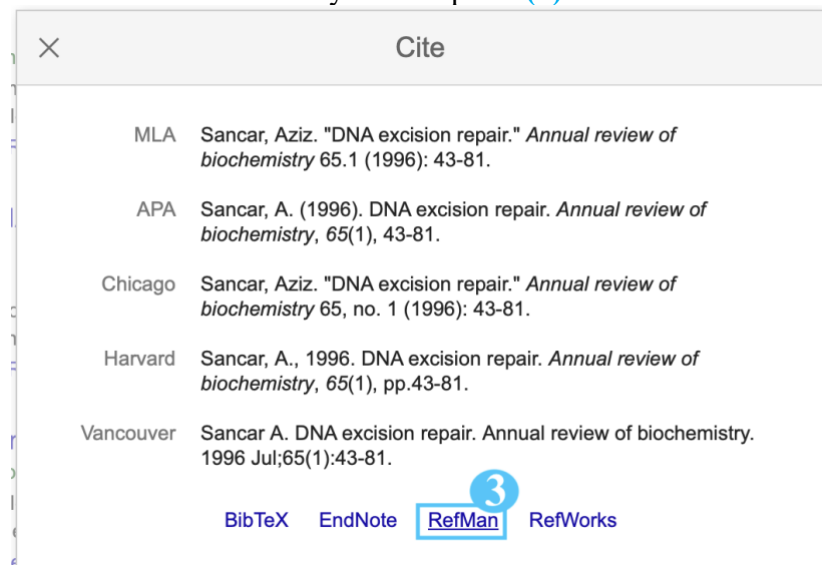
Follow these 3+ steps:

**Steps 1, 2-)** Perform a search on the Google Scholar page (1) and click on the quotation mark (") icon (2) next to the reference.



Screenshot 53 - Import from Google Scholar - 1

**Step 3-)** In the options that appear, select **RefMan**, and then download the file containing the reference information to your computer (3).

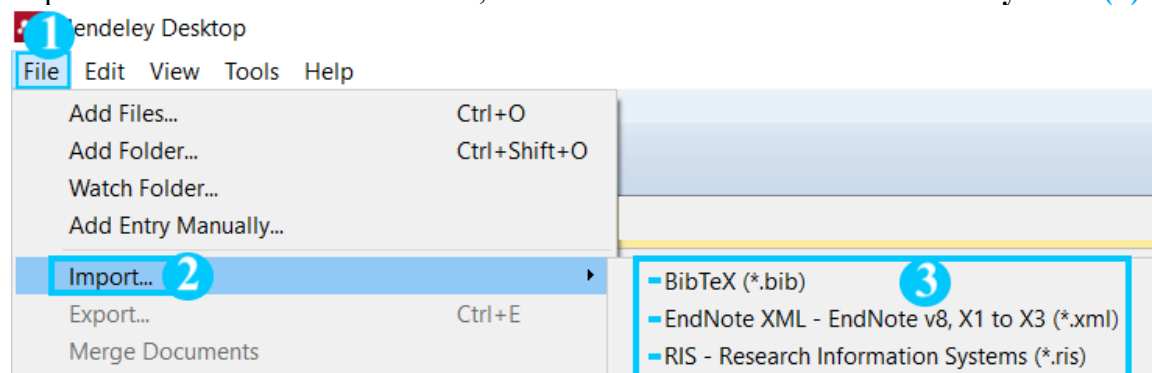


Screenshot 54 - Import from Google Scholar - 2

For detailed instructions on how to transfer the downloaded file to *Mendeley*, see the section titled "e) Import" The importing process is outlined below.

5 Steps for importing the downloaded reference file:

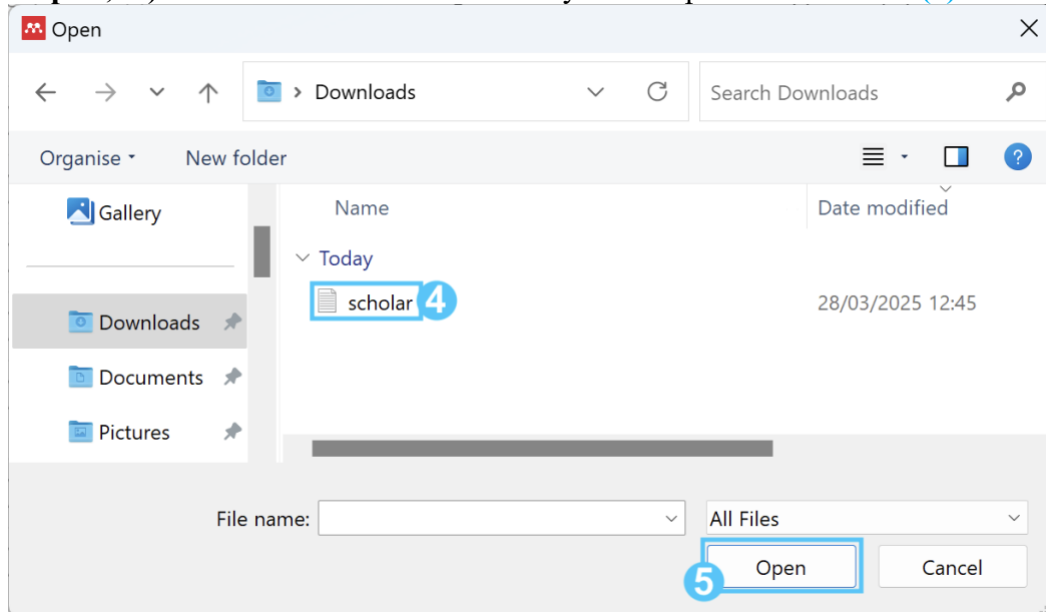
**Steps 1, 2, 3-)** Click on **File** (1) and then select **Import** (2) and choose the appropriate file type for import. For references from RefMan, select "**RIS – Research Information Systems** (3).



Screenshot 55 - Import from Google Scholar - 3



**Steps 4, 5-)** Locate the downloaded file on your computer and select it (4) and click **Open (5)**.



Screenshot 56 - Import from Google Scholar - 4

The source will now be imported and saved in *Mendeley*.

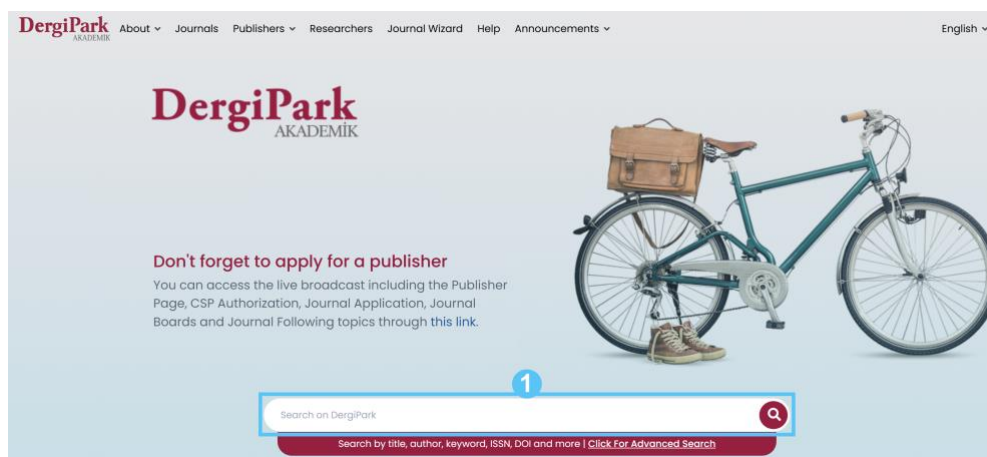
Additionally, sources on Google Scholar can also be saved directly using the “1) Mendeley Web Importer”.

#### ii) DergiPark

References obtained from DergiPark can be saved to your computer using the “1) Mendeley Web Importer”.

Follow these 7 steps:

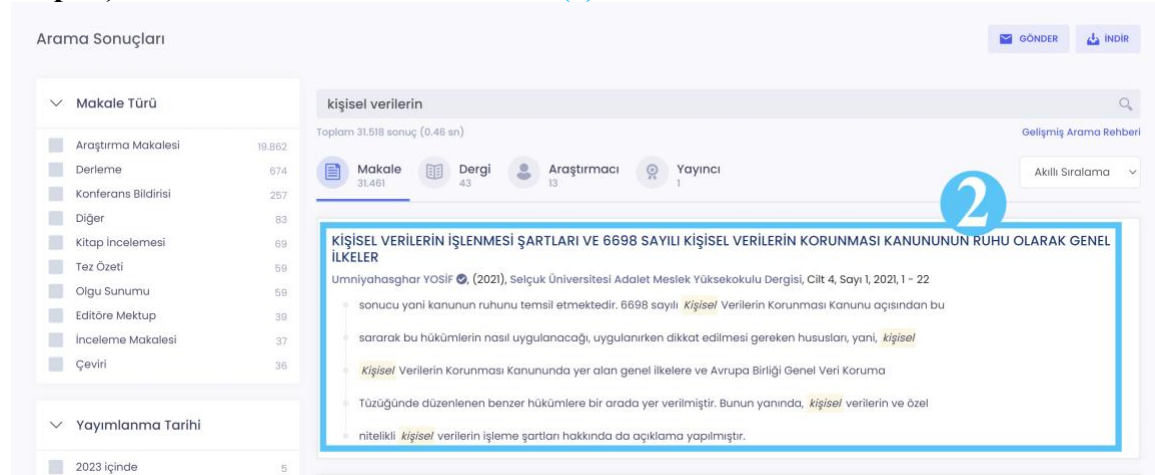
**Step 1-)** Go to the DergiPark home page and enter your keywords to conduct a search (1).



Screenshot 57 - Import from DergiPark - 1



## Step 2-) Click on one of the search results (2).

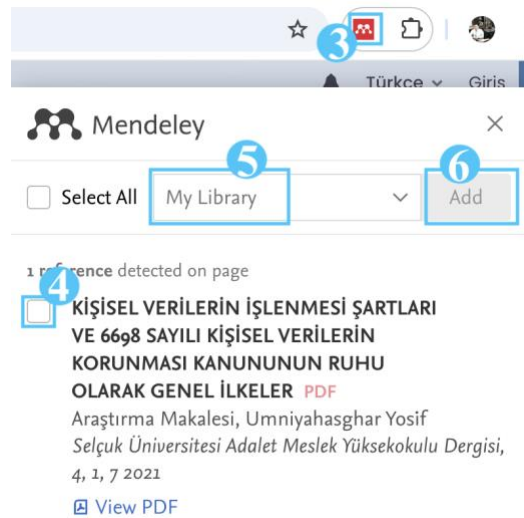


Screenshot 58 - Import from DergiPark - 2



Screenshot 59 - Import from DergiPark - 3

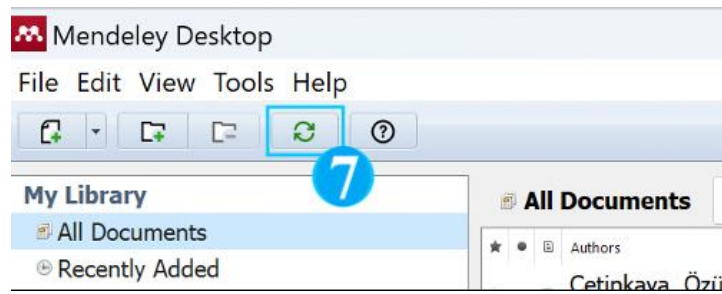
**Steps 3, 4, 5, 6-) When the new screen appears, click on the Mendeley Web Importer add-on (3) in your internet browser. In the add-on window, check the boxes (4) next to the resources you want to save. Choose the library section (5) where you would like to store these resources and click Add (6).**



Screenshot 60 - Import from DergiPark - 4

The selected resources will be saved to your *Mendeley Web* library.

Click the synchronization button (7) in the *Mendeley Desktop* to save the resources from web to desktop.



Screenshot 61 - Import from DergiPark – 5

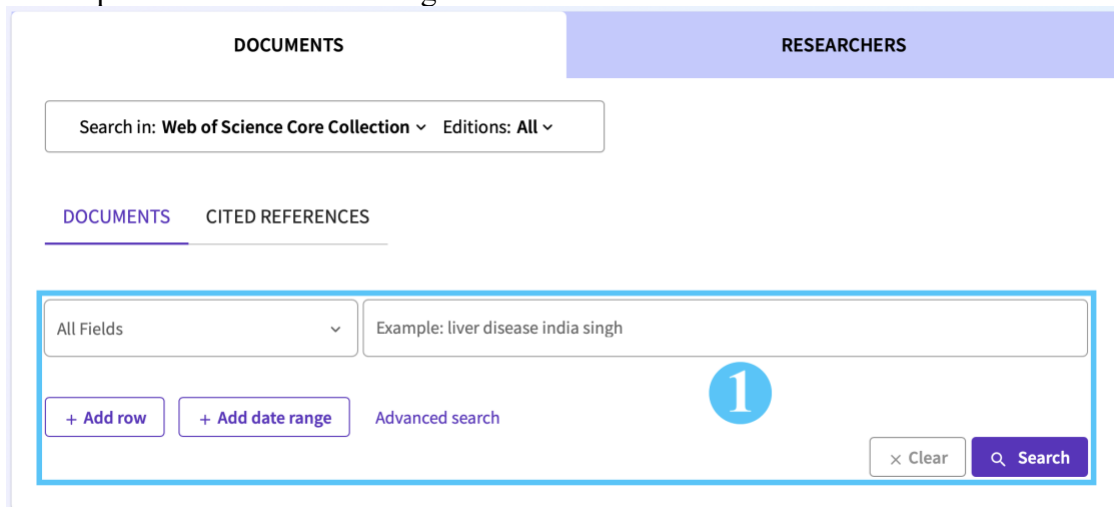
As an alternative method, you can save the references obtained from DergiPark directly to your computer and then “e) Import” them into *Mendeley Desktop*.

### iii) Web of Science

References obtained from Web of Science can be saved to your computer and then transferred to *Mendeley Desktop*.

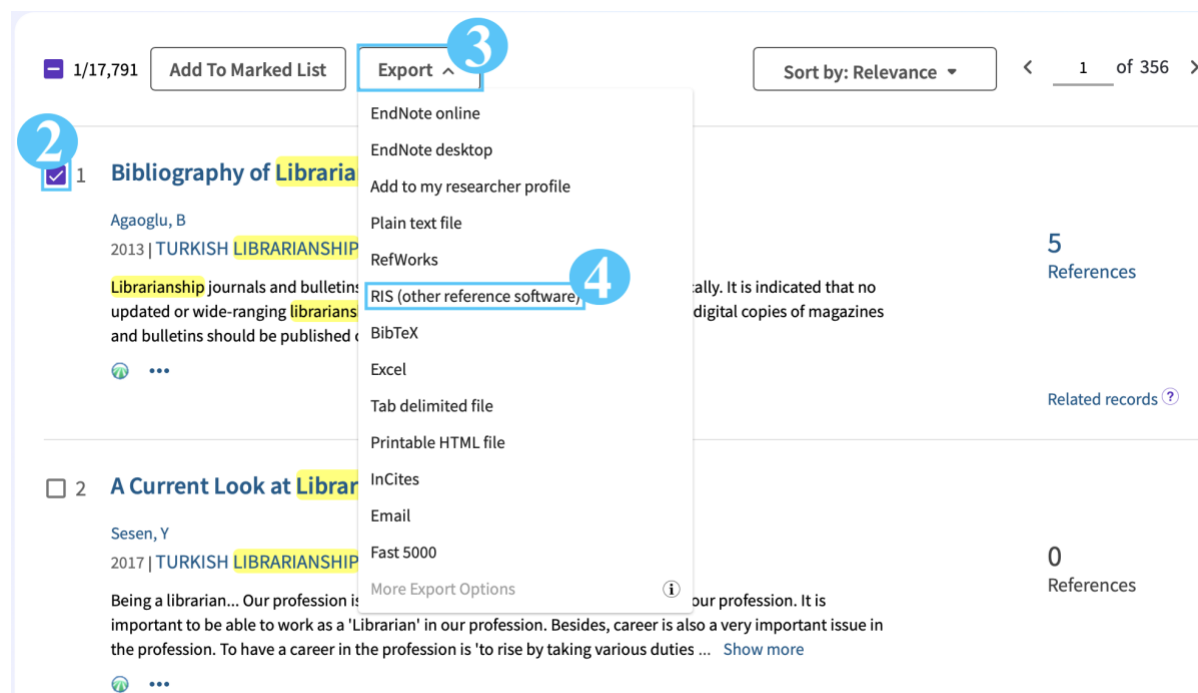
Here are the 7+ steps to save references from WoS:

**Step 1-)** Open the Web of Science website and perform your search (1). Note that access requires a subscription or connection through a subscribed institution's network.



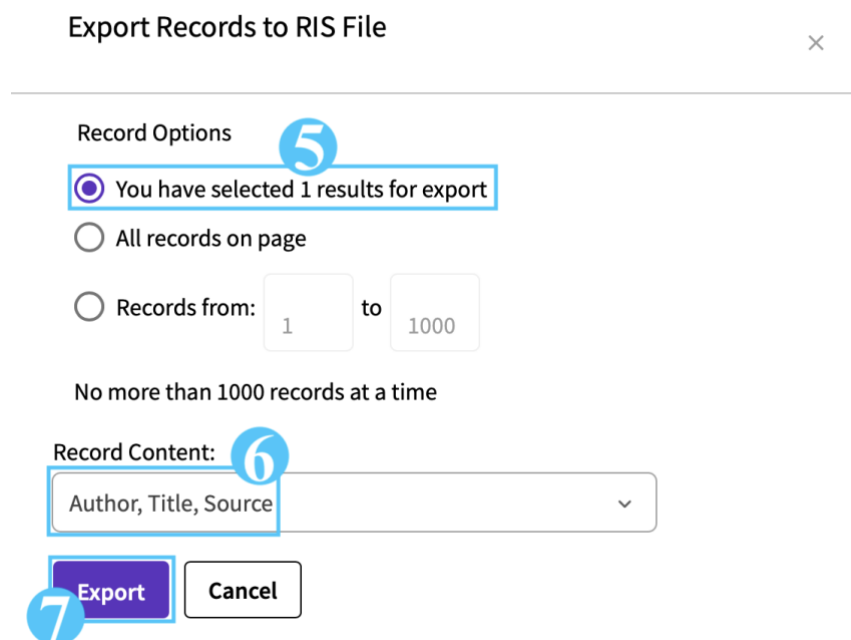
Screenshot 62 - Import from Web of Science - 1

**Steps 2, 3, 4-)** Check the box(es) (2) next to the reference(s) you want to add to *Mendeley*, click on **Export** (3) and select **RIS (other reference software)** (4).



Screenshot 63 - Import from Web of Science - 2

**Steps 5, 6, 7-)** In the search results, specify the references you want to save, again (5), select the bibliographic data titles you wish to download (6), click **Export** (7) to download the file to your computer (note that download permission might be required in your internet browser).



Screenshot 64 - Import from Web of Science - 3

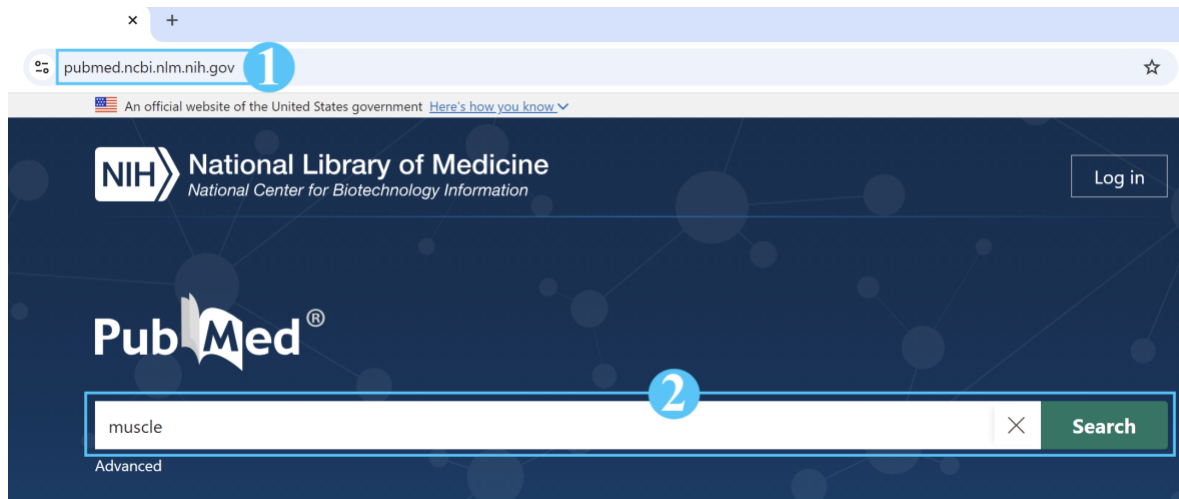
To this point, you should have followed the steps outlined in the “e) Import” section and saved your reference(s) in *Mendeley*.

Alternatively, you can use the “1) Mendeley Web Importer” to save references directly from Web of Science to *Mendeley Desktop*.

#### iv) PubMed

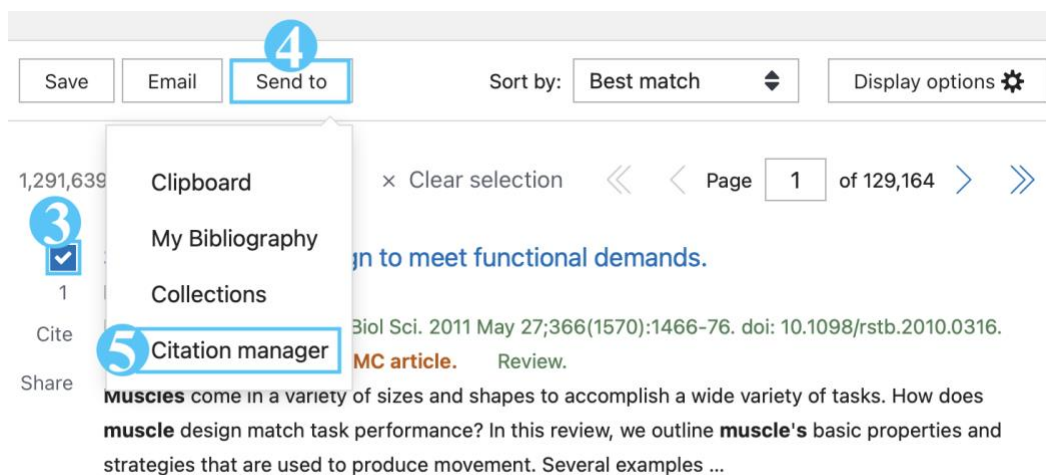
To save references from PubMed and import them into *Mendeley Desktop*, follow these 6+ steps:

**Steps 1, 2-)** Open the PubMed website (1) perform a search to find the references you need (2).



Screenshot 65 - Import from PubMed - 1

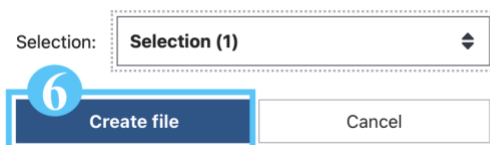
**Steps 3, 4, 5-)** Select the references you want to save by checking the boxes next to each one (3). Click on **Send to** and select **Citation manager** (5).



Screenshot 66 - Import from PubMed - 2

**Step 6-)** Click on **Create file (6)** to download the file to your computer. (Note: You may need to allow download permissions in your internet browser.)

Create a file for external citation management software



Screenshot 67 - Import from PubMed - 3

**Step 7-)** The file will be downloaded to your computer (7).



Screenshot 68 - Import from PubMed - 4

To this point, you should have followed the steps outlined in the “e) Import” section and saved your reference(s) in *Mendeley Desktop*.

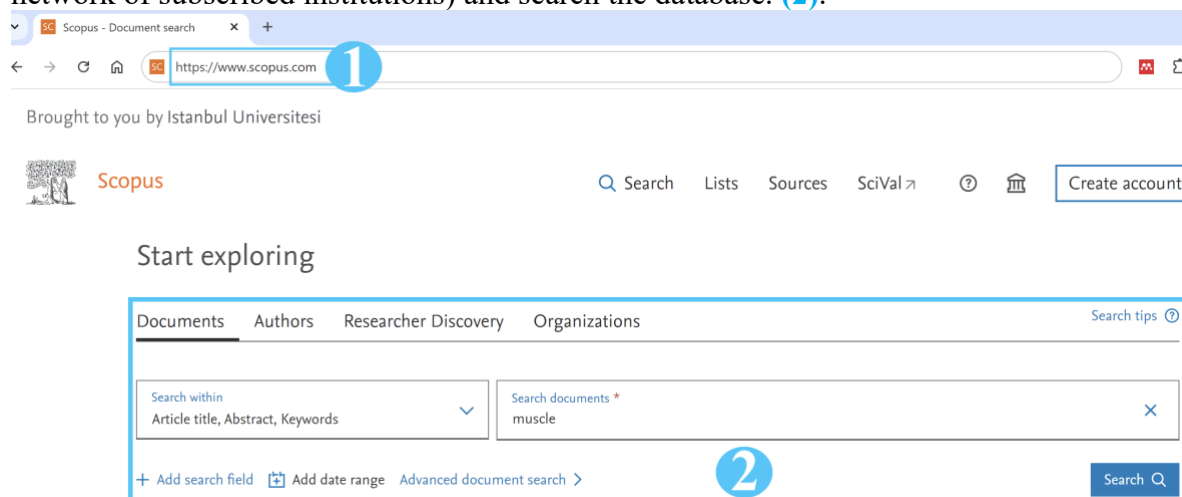
Alternatively, you can use the “1) Mendeley Web Importer” to save references from PubMed into *Mendeley Desktop*.

#### v) Scopus

References obtained from Scopus can be saved to *Mendeley Web* and then synchronized to *Mendeley Desktop*.

Necessary 6 steps:

**Steps 1, 2-)** Access the Scopus database (1) (please note that access requires a subscription or a network of subscribed institutions) and search the database. (2).



Screenshot 69 - Import from Scopus - 1

**Steps 3, 4-)** Check the boxes **(3)** next to the resources you want to add to *Mendeley*. Click on the **Export** option **(4)**.

1,129,817 documents found [Analyze results](#)

Documents Beta Preprints Patents Secondary documents Research data

**4** **Export** Download Citation overview [Show all abstracts](#) Sort by [Date \(newest\)](#) [Grid](#) [List](#)

	Document title	Authors	Source	Year	Citations
<b>3</b> <input type="checkbox"/> 1	Article • <a href="#">Open access</a> <b>A diminutive perivascular epithelioid cell tumor in the colon</b>	Sugimura, N., Hirata, D., Iwatate, M., ... Fujimori, T., Sano, Y.	DEN Open, 5(1), e390	2025	0
	<a href="#">Show abstract</a> <a href="#">View at Publisher</a> <a href="#">Related documents</a>				
<input type="checkbox"/> 2	Article <b>Pregnancy Complications in Women with Uterine Fibroids and the Role of Stem Cells</b>	Muruganatham, J.K., Veerabathiran, R.	Tanzania Journal of Health Research, 25(1), pp. 543–554	2024	0
	<a href="#">Show abstract</a> <a href="#">View at Publisher</a> <a href="#">Related documents</a>				

Screenshot 70 - Import from Scopus - 2

**Step 5-)** Select *Mendeley* **(5)** as the destination for the export. This process transfers the documents to *Mendeley Web*.

File types

CSV

RIS

BibTeX

Plain text

Reference managers

**5** **Mendeley**

Refworks (RIS)

Zotero (RIS)

EndNote (RIS)

Platforms

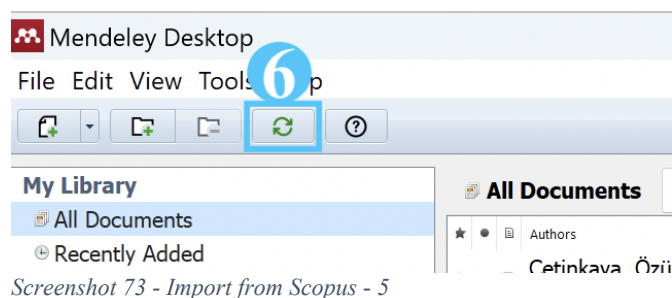
SciVal

Export [Download](#)

✓ The data for the 2 documents you selected has been exported to Mendeley. [View in your Library](#)

Screenshot 71 - Import from Scopus - 3

**Step 6-)** Click the **Sync (6)** button in *Mendeley Desktop*. The recently added sources will be displayed in the **Recently Added** section.



Screenshot 73 - Import from Scopus - 5

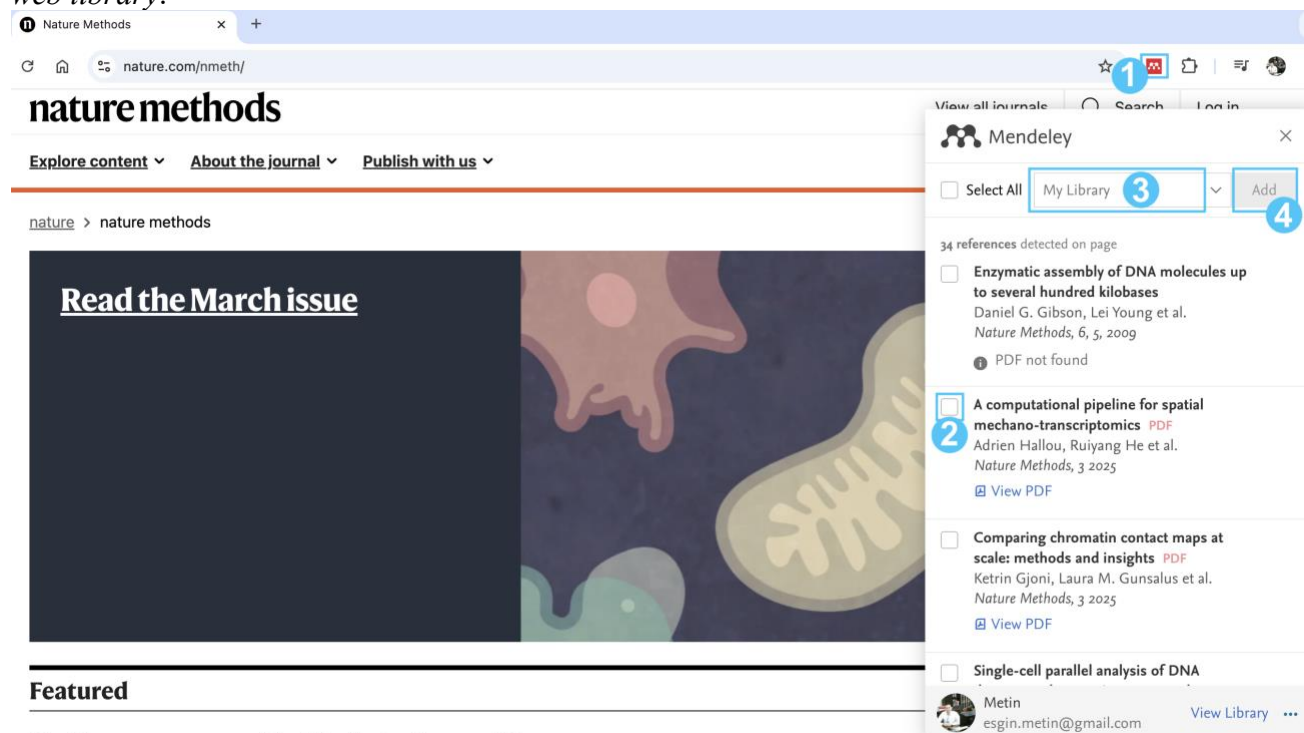
By following these steps, you will successfully add sources from Scopus to *Mendeley Desktop*.

#### d) Other Websites

References from any website can be saved to the *Mendeley Desktop* library using the *Mendeley Web Importer*.

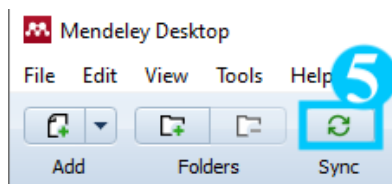
Here are the necessary 5 steps:

**Steps 1, 2, 3, 4-)** Click on the *Mendeley Web Importer* plugin on the relevant website (1). In the window that opens, check the boxes (2) next to the resources you want to save. Select the library section (3) where you want to save the resources and click **Add (4)**. Website saved to the *Mendeley web library*.



Screenshot 74 - Import from Other Websites - 1

**Step 5-)** When the **Sync (5)** button is clicked in the *Mendeley Desktop* software, the source in the internet library is saved to the Desktop software.



Screenshot 75 - Import from Other Websites – 2

### e) Import

Import, lets you save multiple references at once. Even references with detailed citation information—like title, author, year, edition, pages, ISBN, DOI, ISSN, PMID, article number, accession number, keywords, abstract, notes, accession date, translated title, reference type, tags, notes, and more—can be saved in one step, no matter how many there are.

This feature lets you add documents from your computer or export files from databases (e.g. Web of Science, PubMed, WorldCat etc.). Supported file types in *Mendeley Desktop* include:

- .doc/.docx, .odt, pdf .txt, rtf, tab delimited etc. document files.
- ris, xml, .bib, .nbib, zotero sqlite and other bibliographic databases (wos, pubmed, ovid etc.) data files.

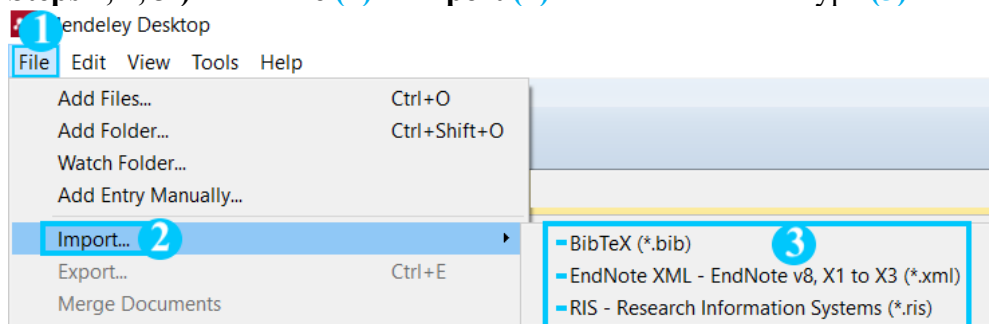
Files must include properly formatted bibliographic data to be saved as references.

After import, use “ii) Merging Duplicate References” to remove duplicates and keep only unique entries.

You can import files in two ways, Drag and Drop and Using Menus.

To import via menus (4 steps):

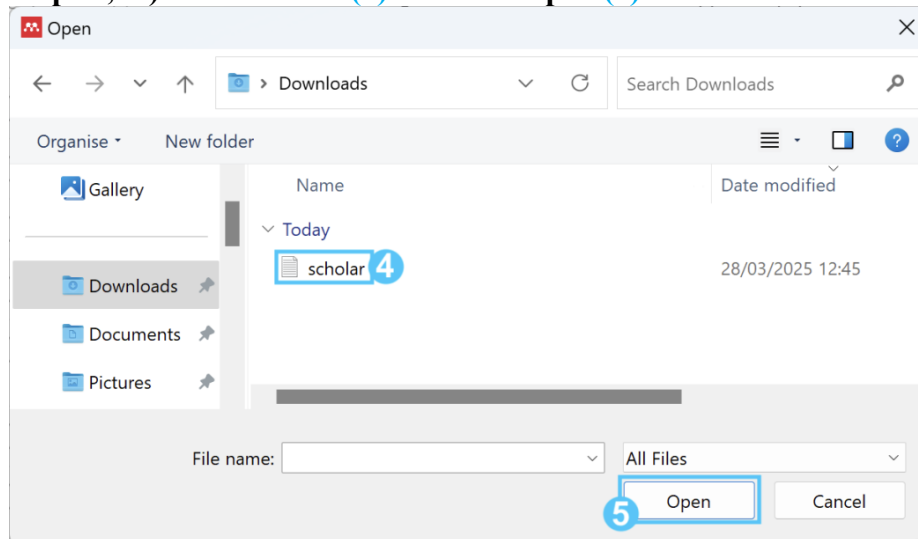
**Steps 1, 2, 3-)** Click **File (1)** > **Import (2)** and choose the file type (3).



Screenshot 76 - Import Menu - 1



**Steps 4, 5-) Select the file (4) and click Open (5).**



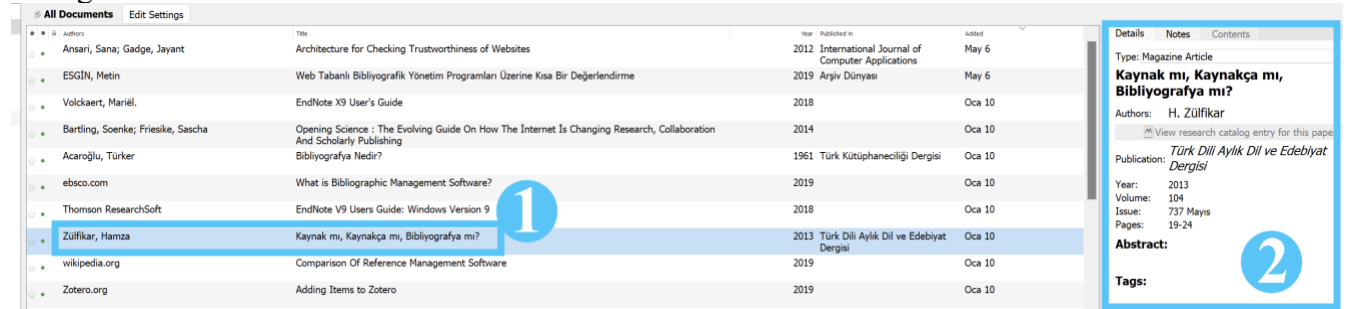
*Screenshot 77 - Import Menu - 2*

The reference is now imported and saved to your library.

### III. LIBRARY FEATURES

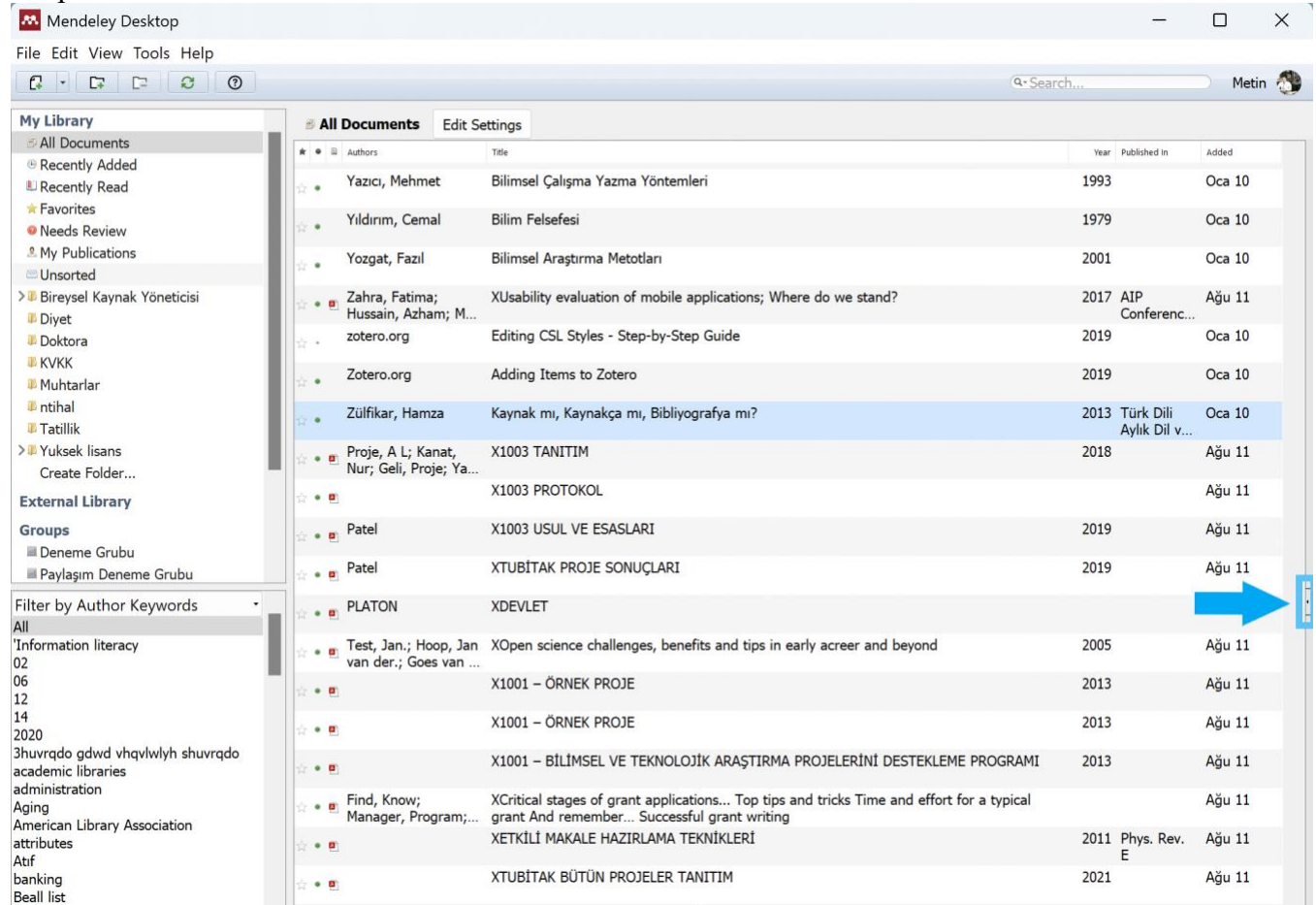
#### a) Editing a Reference

Click the reference in the center panel, then update its details or add a file using the panel on the right.



Screenshot 78 - Reference Editing - 1

If the details panel 2 is hidden, click the arrow-marked button shown in the screenshot below to open it.



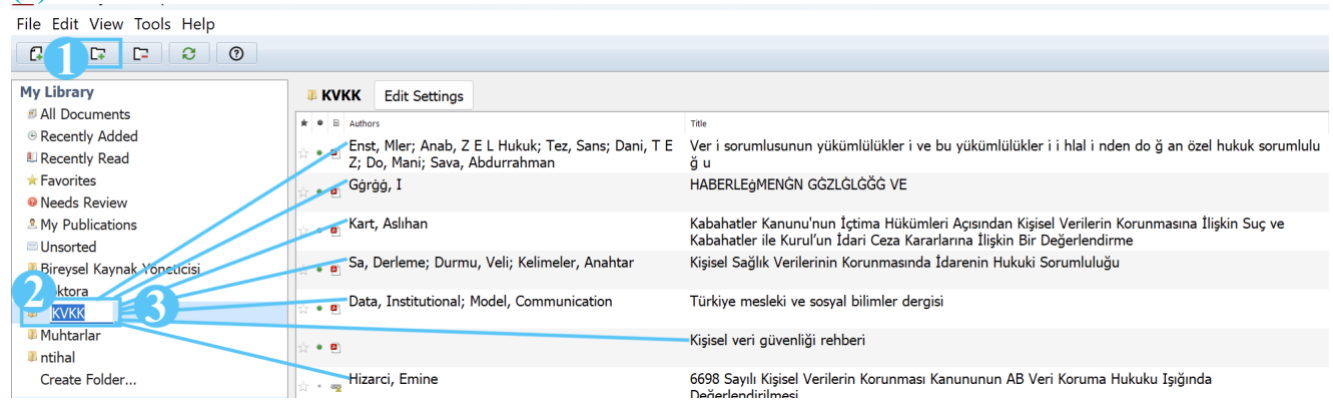
Screenshot 79 - Reference Editing - 2

### i) Grouping References

Organise your library by creating folders:

Here are necessary 3 steps:

**Steps 1, 2, 3-)** Click on **Folders+** (1) and name the new folder (2). Drag and drop references into it (3).



Screenshot 80 - Grouping of References

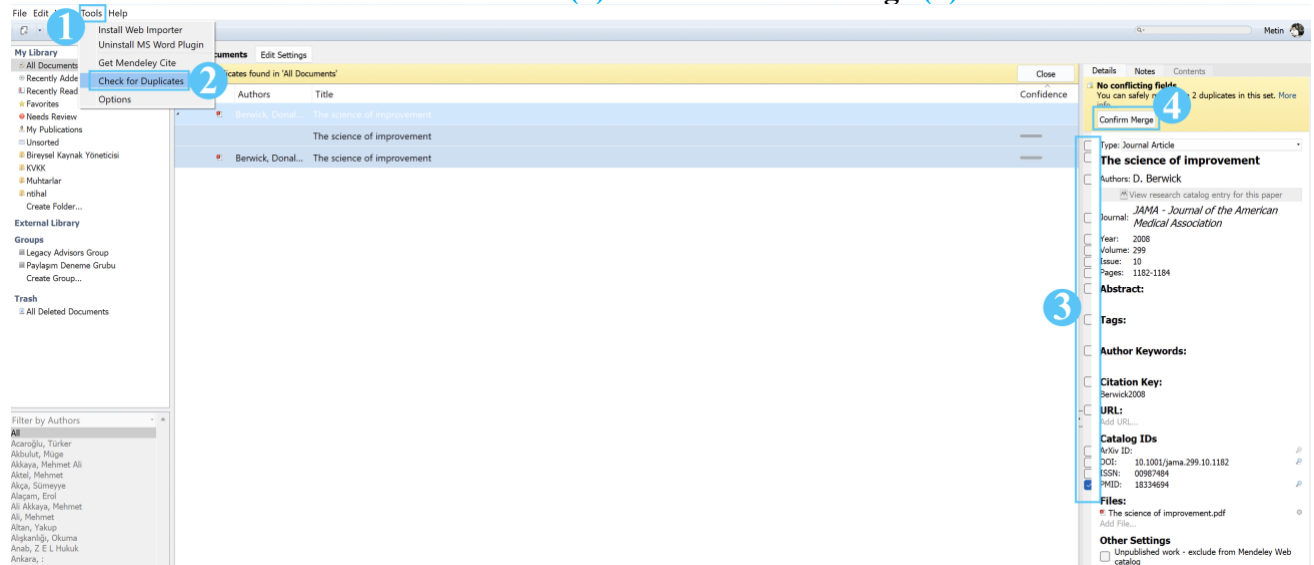
References are now grouped by folder for easier access.

### ii) Merging Duplicates

If the library has duplicate references, they can be automatically detected and merged.

Here are necessary 5 steps:

**Steps 1, 2, 3, 4-)** Click **Tools** (1) select **Check for Duplicates** (2). Choose the info to keep from the detail boxes or use the automatic selection. (3). Click **Confirm Merge** (4).

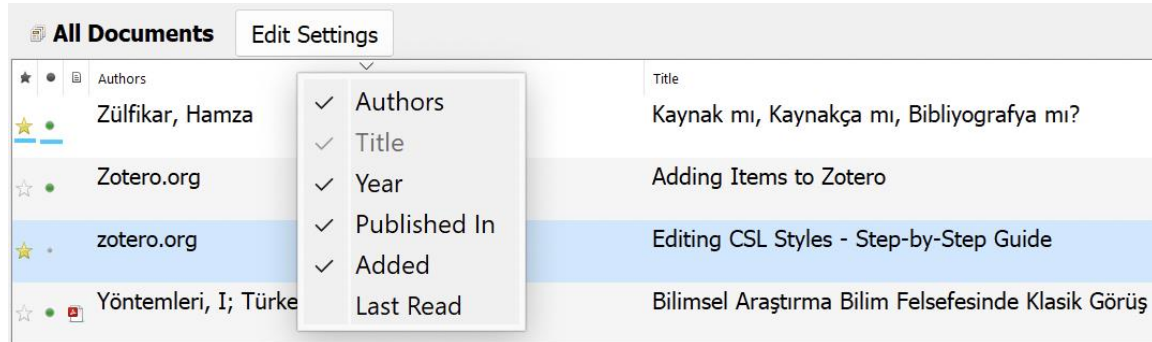


Screenshot 81 - Merging Duplicate References

The duplicate references are now merged.

### iii) Customize the Library

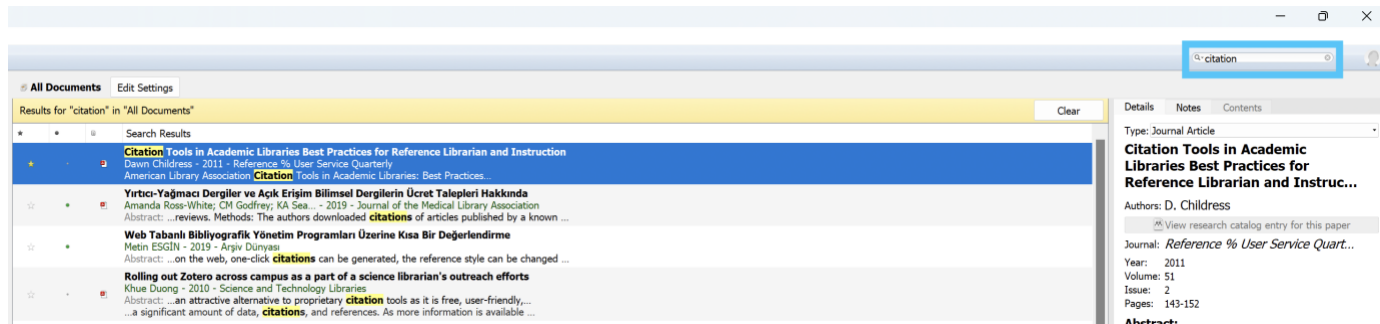
You can mark references with a star or green circle. Right-click the top ribbon to show or hide fields like **Author**, **Year**, **Published In**, **Added**, or **Last Read**.



Screenshot 82 - Customize the Library

### iv) Search

Type a keyword in the search bar to see results listed in the center.



Screenshot 83 - Searching for References in the Library

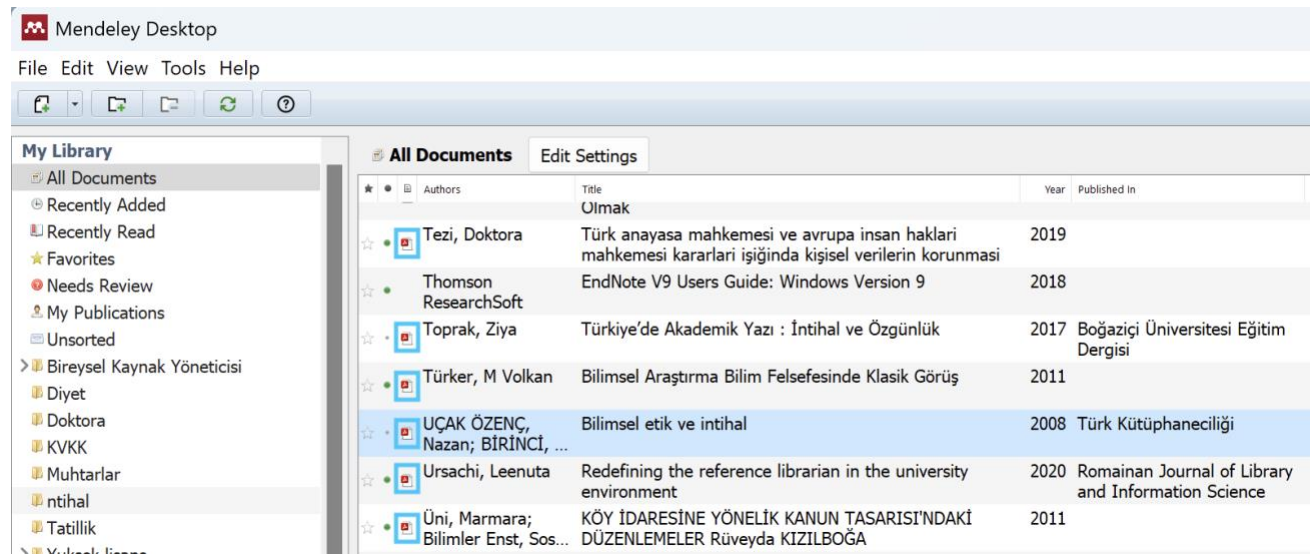
## v) Filter

Enter tags in the **Tags (1)** field under reference details. All tags appear in the Tags list (2), where you can click or search to find tagged references (Esgin, 2019, p. 100).

The screenshot shows the Mendeley Desktop application window. On the left, the 'My Library' sidebar is visible, with a 'Filter by Author Keywords' section highlighted by a blue box and a red circle with the number '2'. This section lists various keywords such as 'All', 'Information literacy', '02', '06', '12', '14', '2020', '3huvrqdo gdw d vhwlvwlyh shuvrqdo', 'academic libraries', 'administration', 'Aging', 'American Library Association', 'attributes', 'Auf', 'banking', 'Baall list', 'bibliographic management software', 'Bibliyografik Yönetim Programları', 'Bibliyografya', 'big data', 'Bilimsel etik', 'bir takım kişisel verileri', 'bu veriler aslında', and 'bulunmaktadır'. The main window displays a list of documents under the 'All Documents' tab. The table has columns for Authors, Title, Year, Published in, and Added. One document is highlighted: 'Kaynak mı, Kaynakça mı, Bibliyografya mı?' by Zulfikar, Hamza, published in 2013. On the right, the 'Details' panel for this document is shown, with a 'Tags' field highlighted by a blue box and a red circle with the number '1'. The 'Tags' field contains the text 'Kaynak mı, Kaynakça mı, Bibliyografya mı?'. Below the 'Tags' field, there are sections for 'Author Keywords', 'Citation Key', 'City', 'Month', 'URL', 'Catalog IDs', 'Files', and 'Other Settings'.

Screenshot 84 - Library Filtering

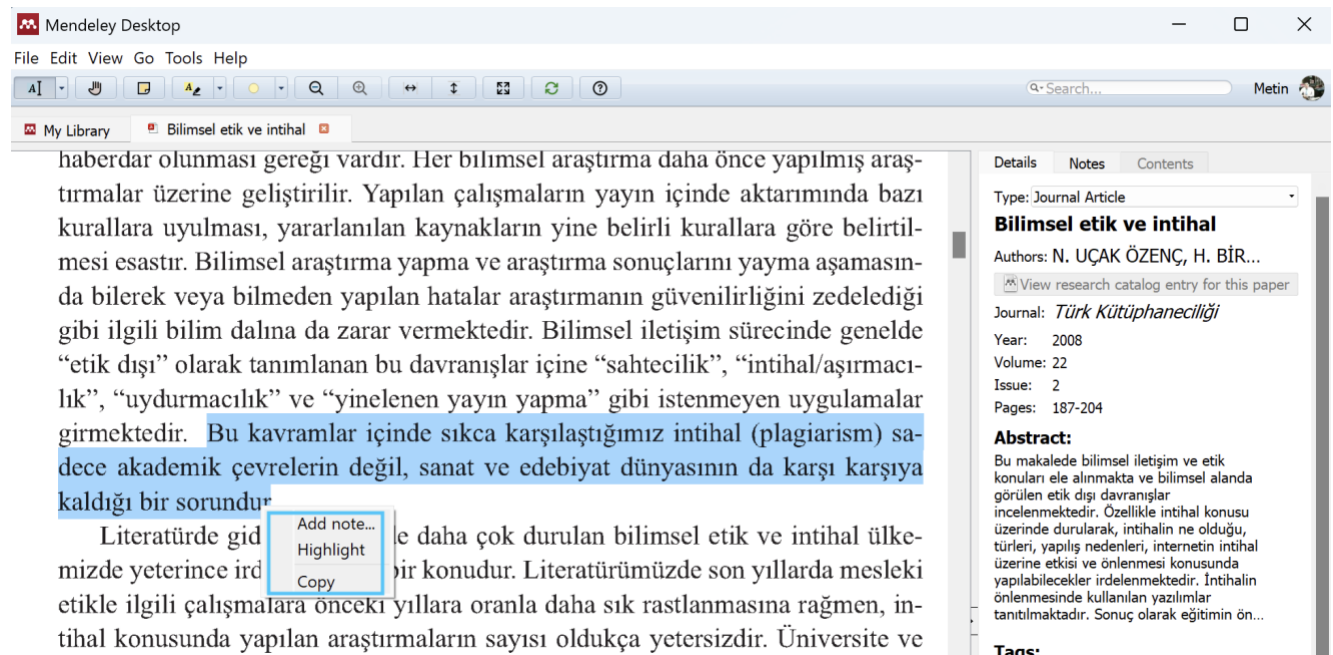
## b) PDF Viewing and Annotation



Screenshot 85 - Taking Notes on PDF in the Library - 1

Click the PDF icon in *Mendeley* to open the file.

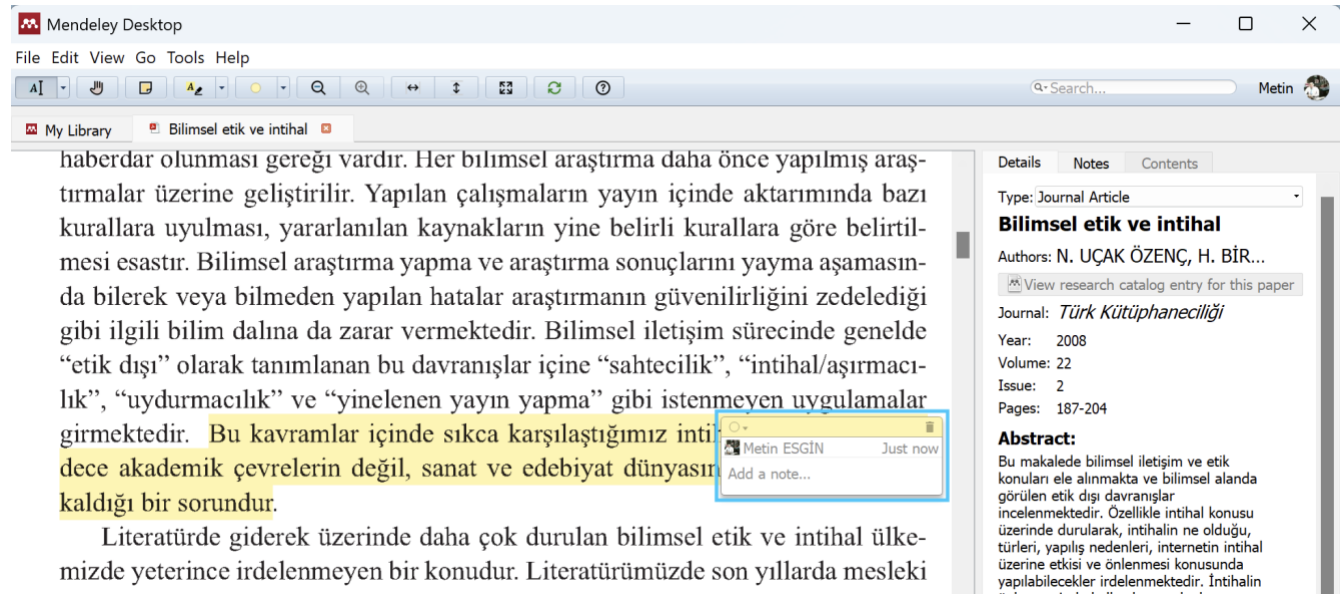
Use **Highlight** (right-click) to colour text with various colours. Click **Add note...** to write notes on the PDF.



Screenshot 86 - Taking Notes on PDF in the Library - 2

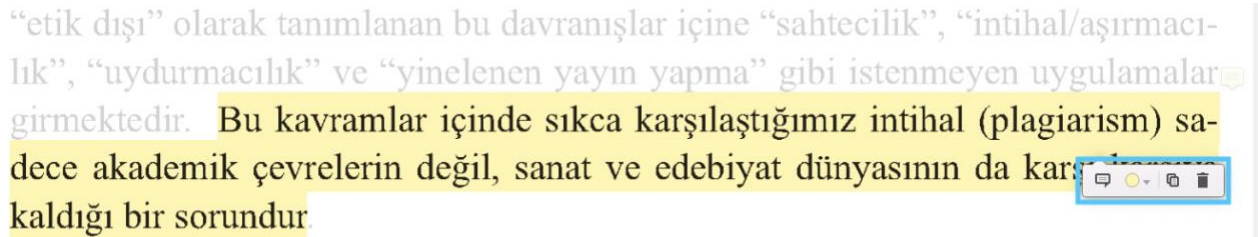


Write notes in the box that appears. They're saved automatically when you click elsewhere—no save button needed.



Screenshot 87 - Taking Notes on PDF in the Library - 3

Click a saved note to open options. You can colour, edit, copy, or delete the note.



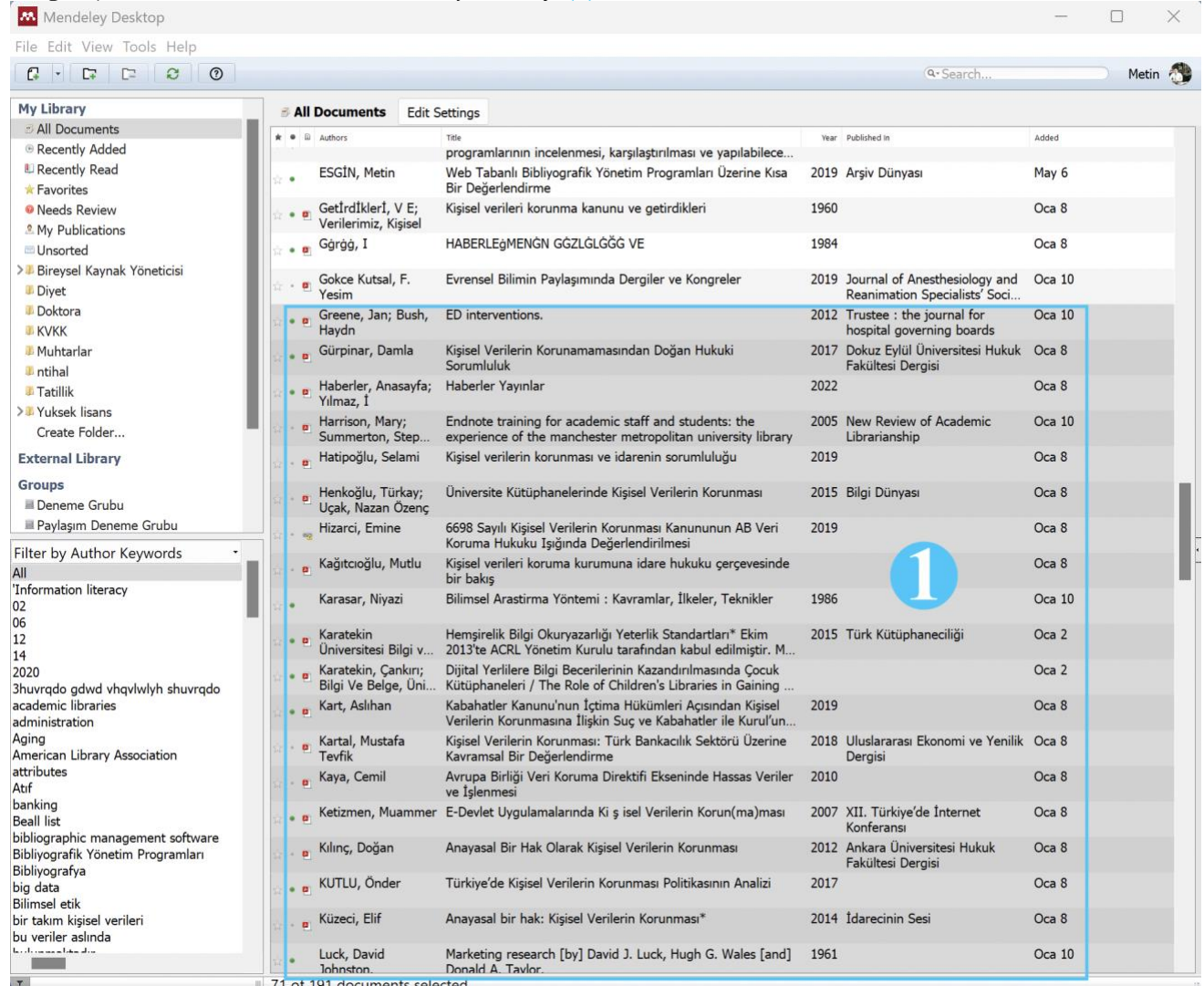
Screenshot 88 - Taking Notes on PDF in the Library - 4

### c) Backup and Share

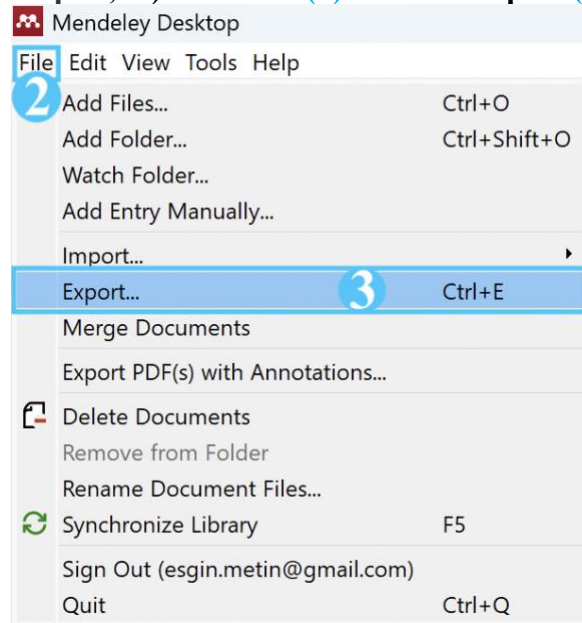
#### i) Backup

You can export and save all or selected references from *Mendeley*.

Here are necessary 6 steps:

**Step 1-) Select records in the Mendeley library (1).**

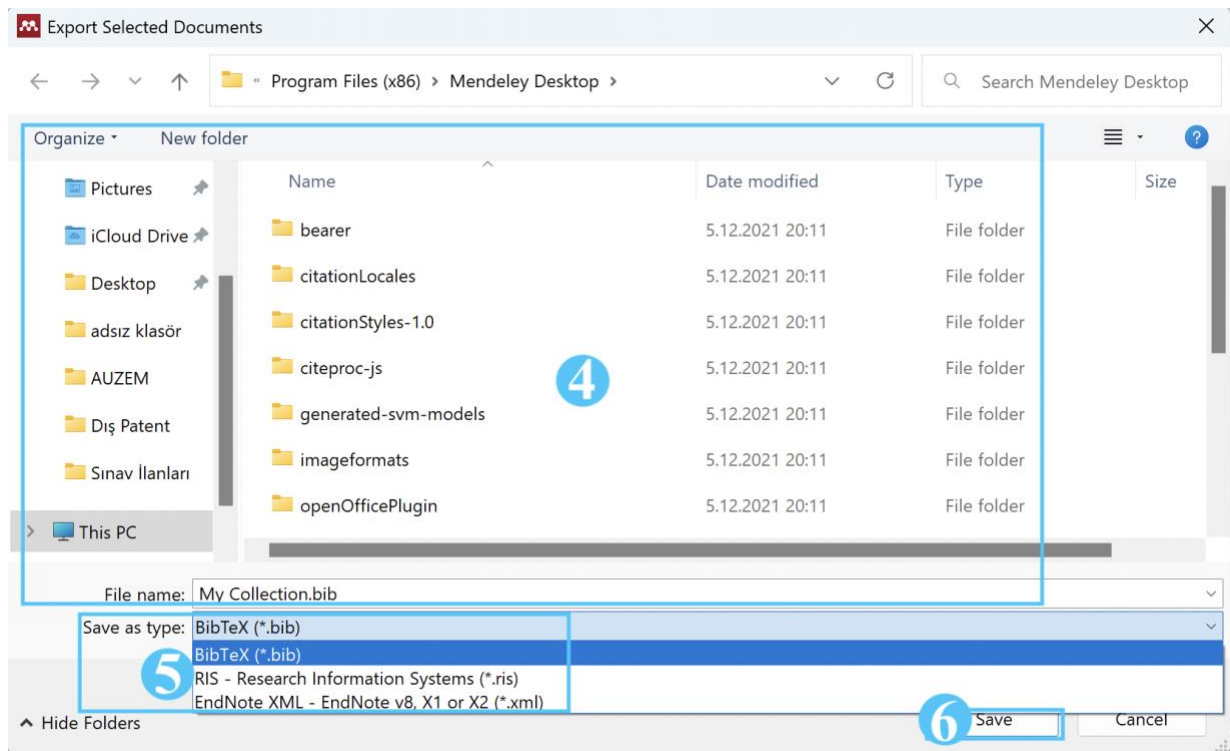
Screenshot 89 - Backup References - 1

**Steps 2, 3-) Click File (2) and then Export (3).**

Screenshot 90 - Backup References - 2



**Steps 4, 5, 6-)** Choose the export location (4), file type (5), and click **Save** (6).



Screenshot 91 - Backup References - 3

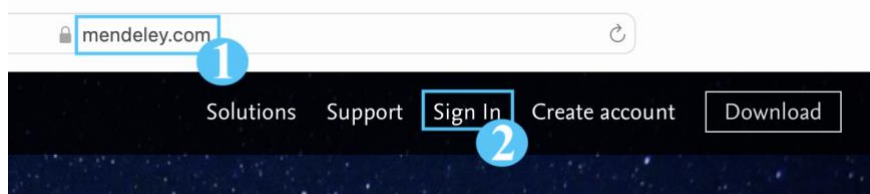
Your selected references are now backed up.

### ii) Sharing with Others

You can share all or selected references with other *Mendeley* users.

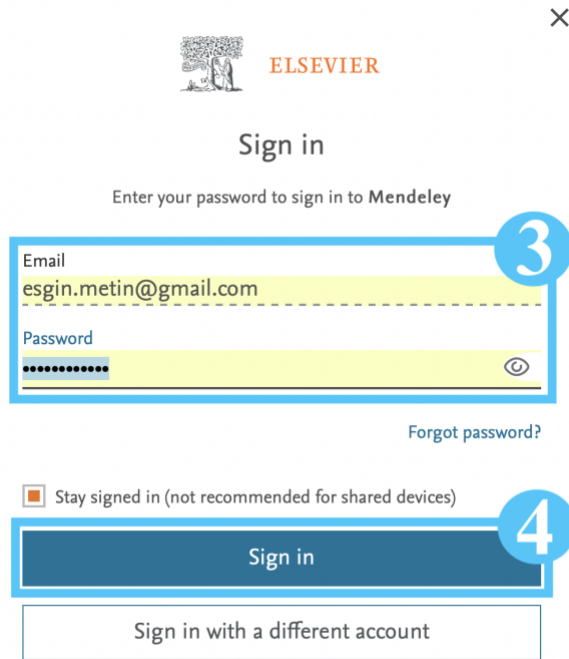
Here are necessary 11 steps:

**Steps 1, 2-)** Go to [mendeley.com](https://mendeley.com) (1) website and click **Sign In** (2).



Screenshot 92 - Sharing the Reference Library with Other Users - 1

**Steps 3, 4-) Enter your Mendeley username and password (3), then click Sign In (4).**



Sign in

Enter your password to sign in to Mendeley

Email  
esgin.metin@gmail.com

Password  
.....

Forgot password?

☐ Stay signed in (not recommended for shared devices)

Sign in

Sign in with a different account

Screenshot 93 - Sharing the Reference Library with Other Users - 2

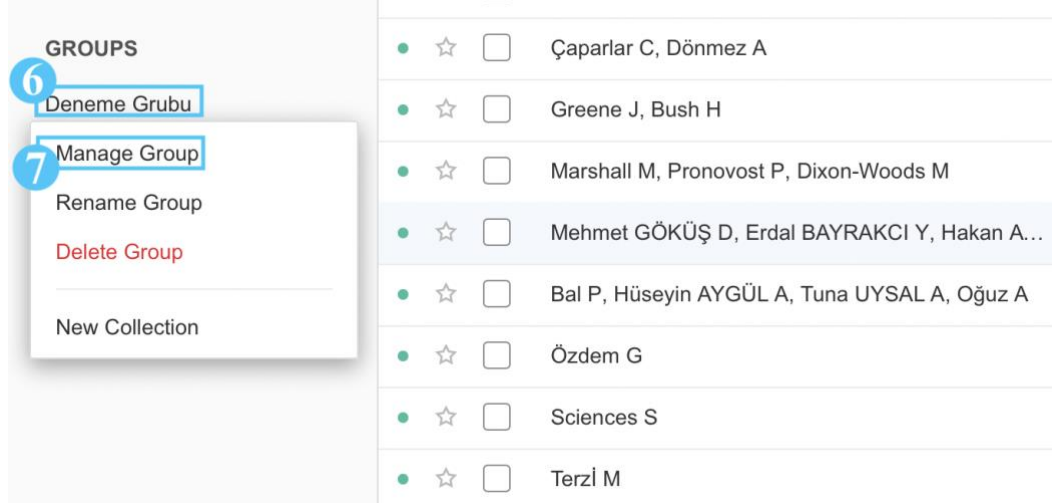
**Step 5-) Click Library (5) next to your username.**



Search Library Metin ESGİN

Screenshot 94 - Sharing the Reference Library with Other Users - 3

**Steps 6, 7-) In the Groups section (bottom-left), create a new group or use an existing one. Right-click a group name (6) and click Manage Group (7).**



GROUPS

Deneme Grubu

Manage Group

Rename Group

Delete Group

New Collection

Çaparlar C, Dönmez A

Greene J, Bush H

Marshall M, Pronovost P, Dixon-Woods M

Mehmet GÖKÜŞ D, Erdal BAYRAKCI Y, Hakan A...

Bal P, Hüseyin AYGÜL A, Tuna UYSAL A, Oğuz A

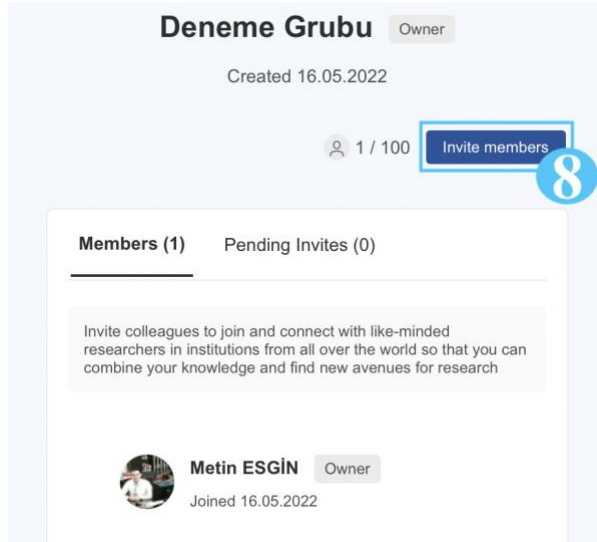
Özdem G

Sciences S

Terzi M

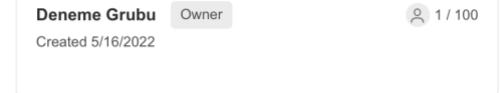
Screenshot 95 - Sharing the Reference Library with Other Users - 4

**Steps 8, 9, 10-) Click Invite members (8), enter emails (9), and click Send invites (10).**

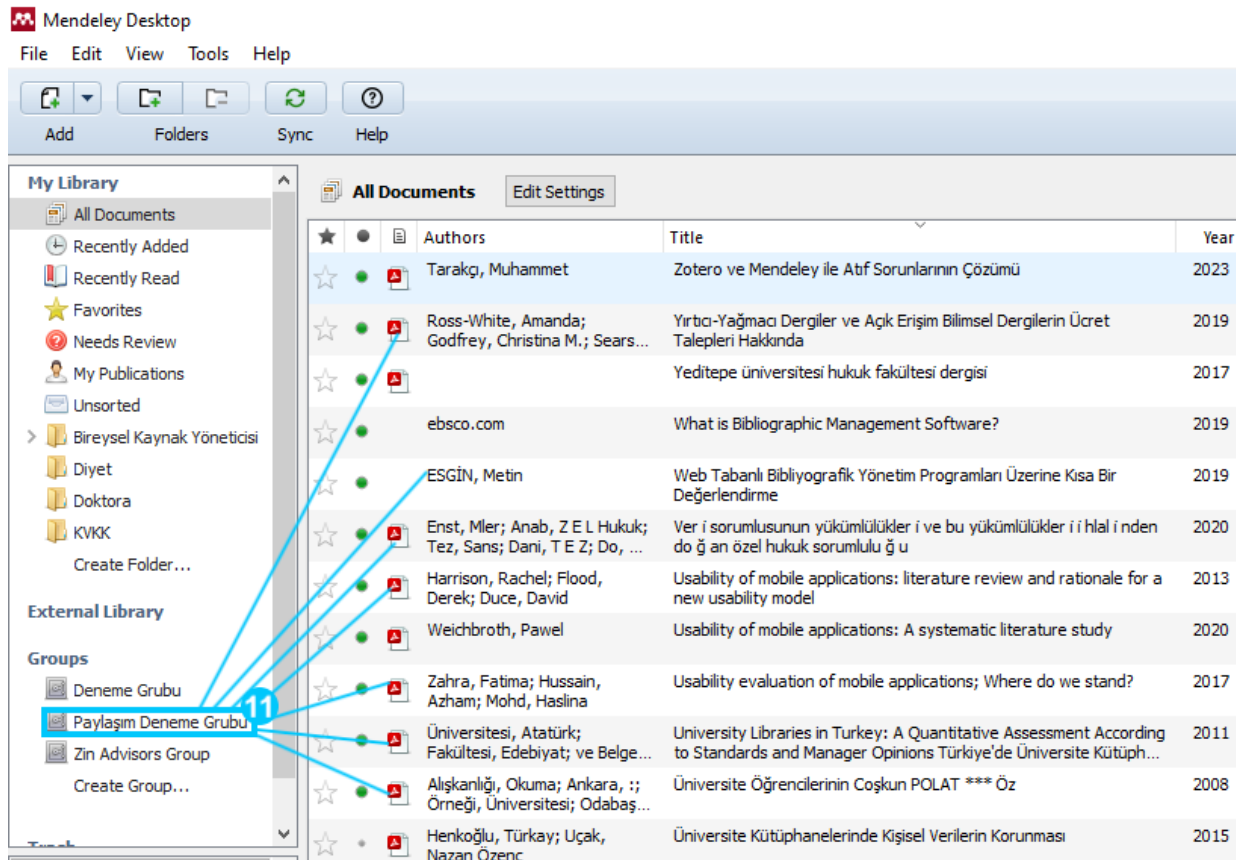


Screenshot 96 - Sharing the Reference Library with Other Users - 5

#### INVITE MEMBERS TO



Screenshot 97 - Sharing the Reference Library with Other Users - 6

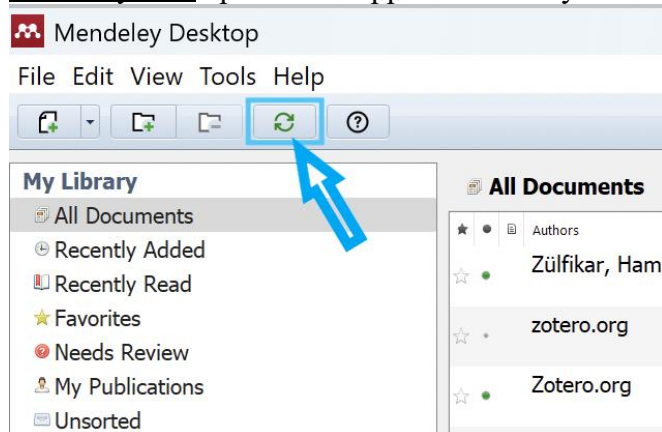


Screenshot 98 - Sharing the Reference Library with Other Users - 7

Drag and drop references into the group (11) to share. Changes sync with *Mendeley Web*. Sharing is now complete.

### iii) Internet Synchronization

Click the **Sync** button to sync references and PDFs between *Mendeley Desktop* and mendeley.com updates are applied both ways.



Screenshot 99 - Mendeley Desktop and Internet Account Synchronization

**Note:** You must have a mendeley.com account and be logged into *Mendeley Desktop* for syncing.

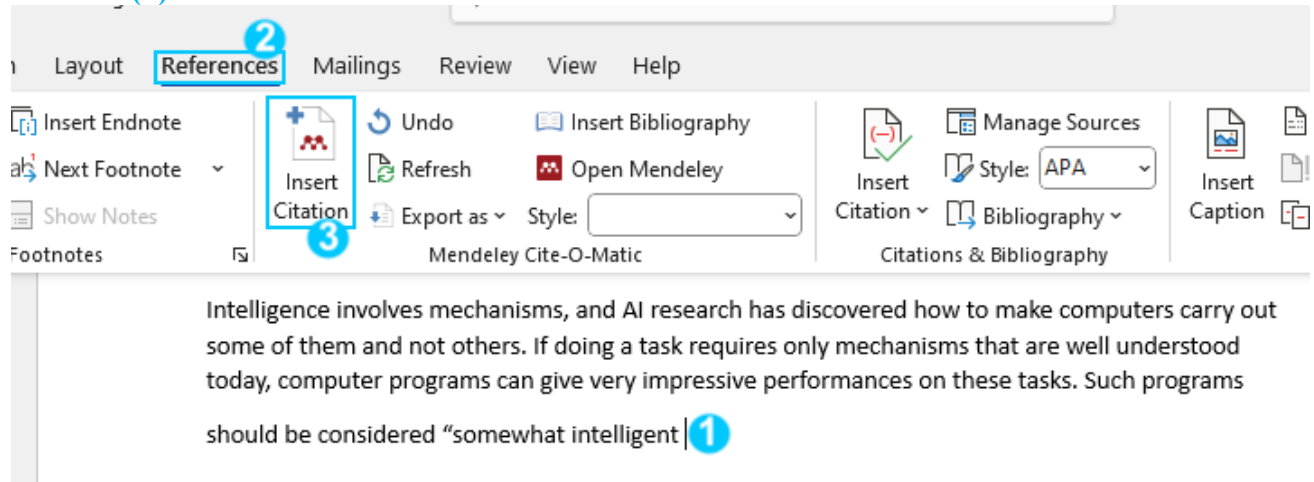
## IV. CITATION AND REFERENCES

### a) Creating and Editing Citations

#### i) Creating Citations

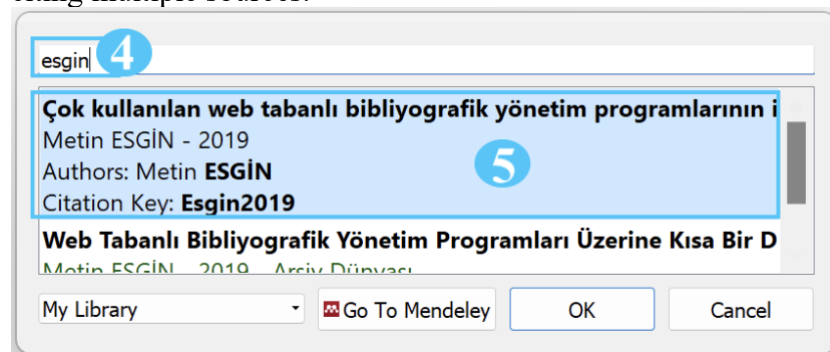
To insert a citation or footnote into a document (8 steps):

**Steps 1, 2, 3-)** Place the cursor where you want the citation (1), click **References** (2), then **Insert Citation** (3).



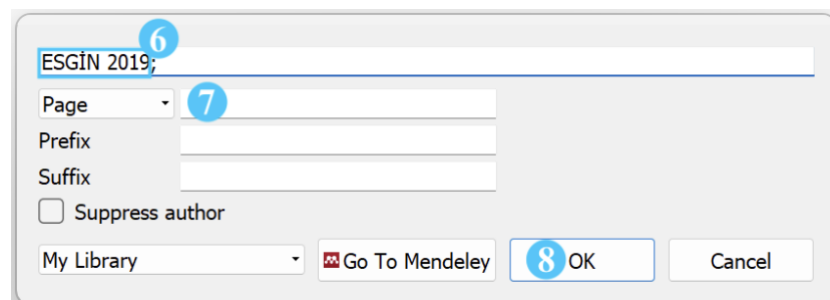
Screenshot 100 - Creating Citations / Footnotes - 1

**Steps 4, 5-)** In the window that opens, type citation info (4) and select the reference (5). Repeat if citing multiple sources.



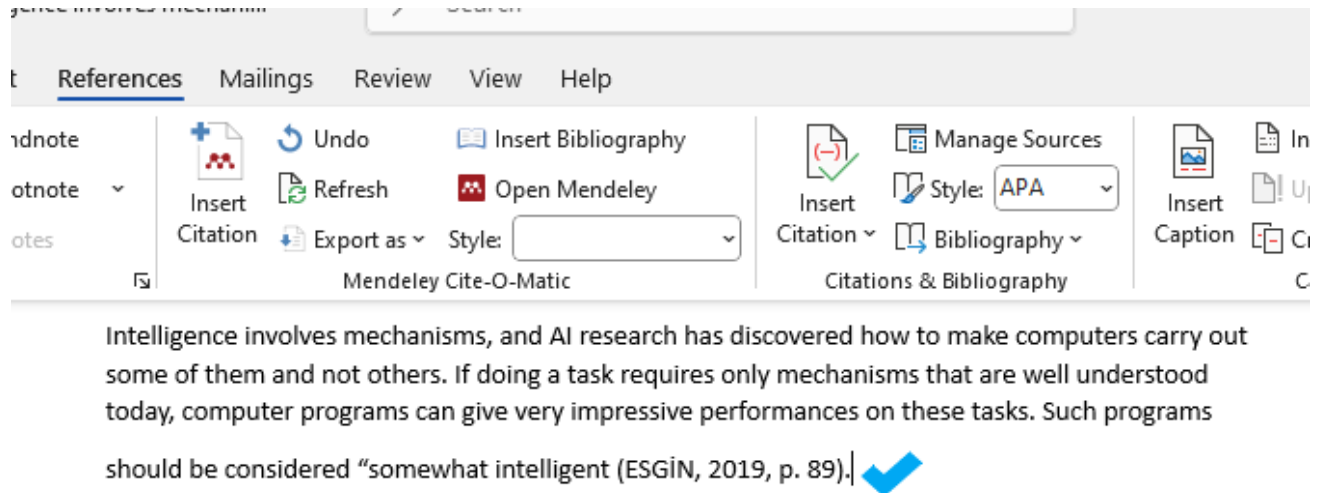
Screenshot 101 - Creating Citations / Footnotes - 2

**Steps 6, 7, 8-)** To add page numbers, click the reference name (6), enter the page in the **Page** field (7), and click **OK** (8).



Screenshot 102 - Creating Citations / Footnotes - 3

The citation will appear in the chosen style (e.g., APA, Chicago).



Screenshot 103 - Creating Citations / Footnotes - 4

**Note:** In-line or footnote format depends on the selected citation style.

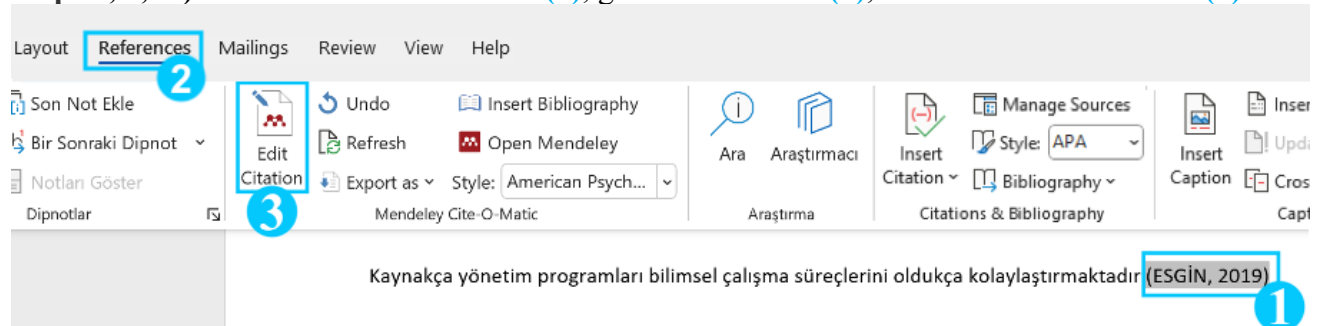
The steps for creating a bibliography are explained in section “b) Creating and Editing a Bibliography”.

### ii) Citation Editing

You can update or add more citations to an existing one.

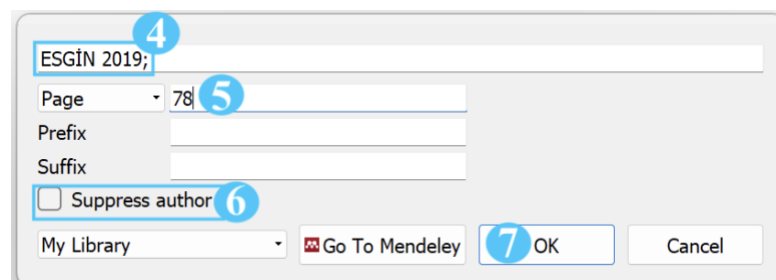
Here are necessary steps 7 steps:

**Steps 1, 2, 3-)** Click the citation/footnote (1), go to **References** (2), and select **Edit Citation** (3).



Screenshot 104 - Citation / Footnote Editing - 1

**Steps 4, 5, 6, 7-)** In the window, type the reference info to edit or add (4), enter/edit a **page number** (5), check **Suppress author** if needed (6), and click **OK** (7).

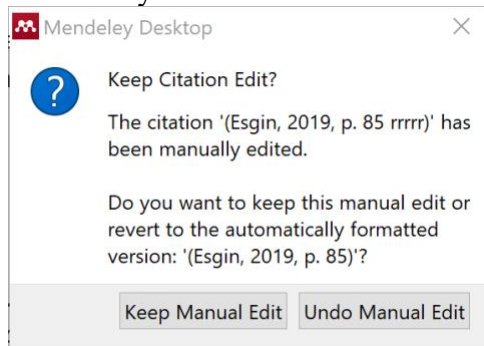


Screenshot 105 - Citation / Footnote Editing - 2

The citation is now updated.

### CAUTION !!!

You can manually edit citations, but if you change the citation style or click Refresh, *Mendeley* will warn you.



Screenshot 106 - Citation / Footnote Editing - 3

**Keep Manual Edit** keeps your changes. **Undo Manual Edit** removes them and restores the original formatting.

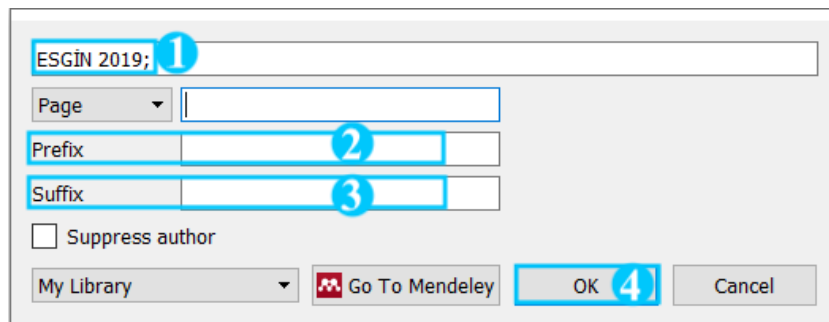
To avoid losing edits, pick the correct style early and limit manual changes.

#### 1) Adding Prefix and Suffix

Use the Prefix and Suffix fields to add text before or after a citation.

Here are necessary 4 steps:

**Steps 1, 2, 3, 4-)** Click the added reference (1). Enter text in the **Prefix** (2) and **Suffix** (3) fields, then click **OK** (4).



Screenshot 107 - Adding Prefix and Suffix to Citation

**Note:** The citation window appears during both Insert Citation and Edit Citation steps.

#### b) Creating and Editing Bibliography

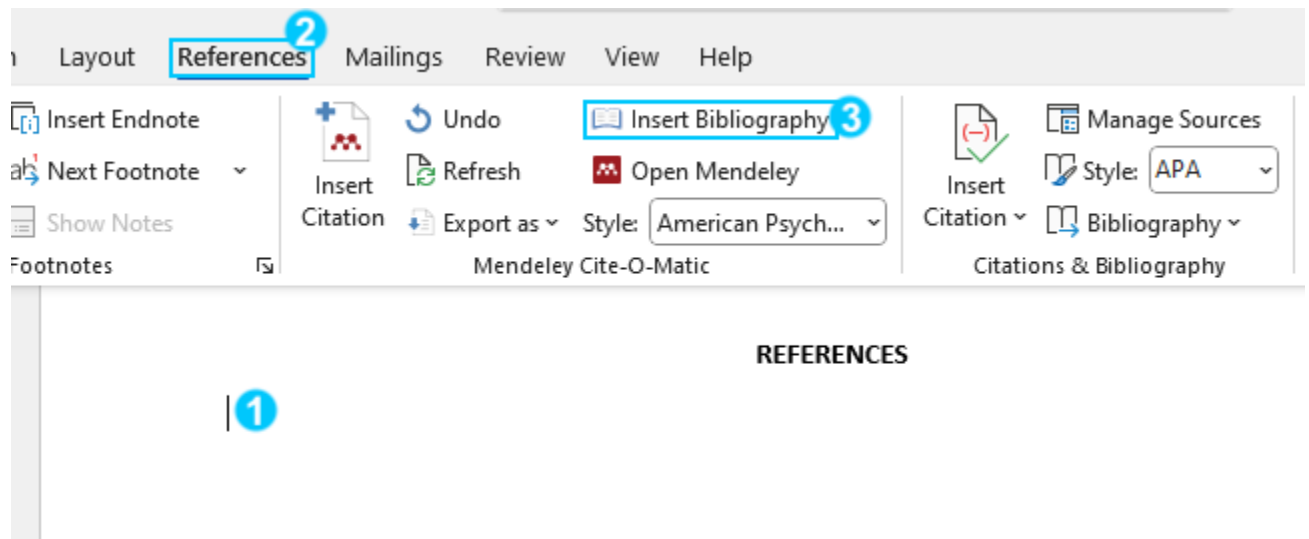
##### i) Creating a Bibliography

Bibliographies aren't created automatically with citations—they must be added manually.

Here are necessary 3 steps:

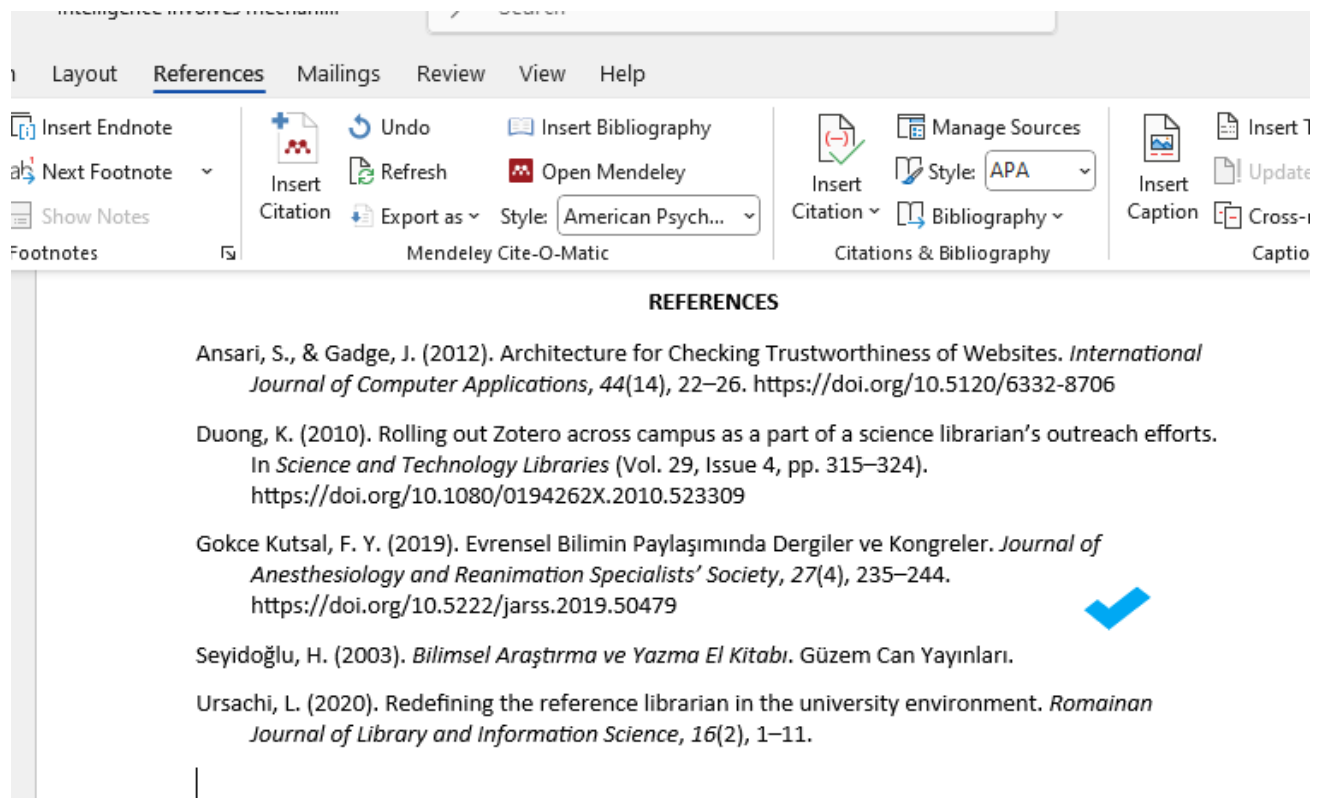


Steps 1, 2, 3-) Place the cursor where you want the bibliography (1), then click **References** (2) > **Insert Bibliography** (3).



Screenshot 108 - Creating a Bibliography - 1

The bibliography will appear, formatted in the selected citation style (e.g., APA, Chicago).



Screenshot 109 - Creating a Bibliography – 2

### ii) Bibliography Editing

You can automatically change the bibliography style anytime. See section “d) Choosing and Finding a Citation Style” for details.

Manual edits or notes can be added, but read the caution below:



**CAUTION !!!**

Manual changes to the bibliography are allowed, but they will be lost if you change the citation style or click Refresh in Word. The software will reformat everything based on the selected style.

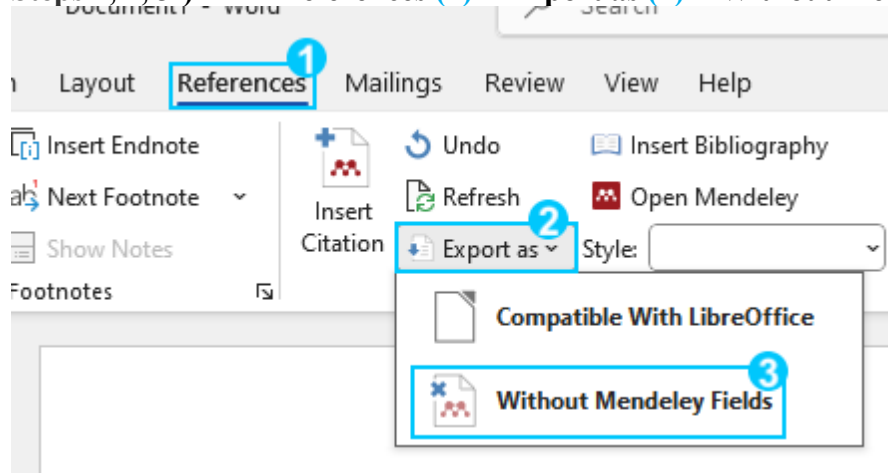
To avoid redoing edits, choose the correct style early and limit manual changes until the final stage.

**c) Converting Citation and Bibliography Fields to Plain Text**

Mendeley adds hidden code fields to citations and bibliographies. These can be removed if needed for submission or sharing.

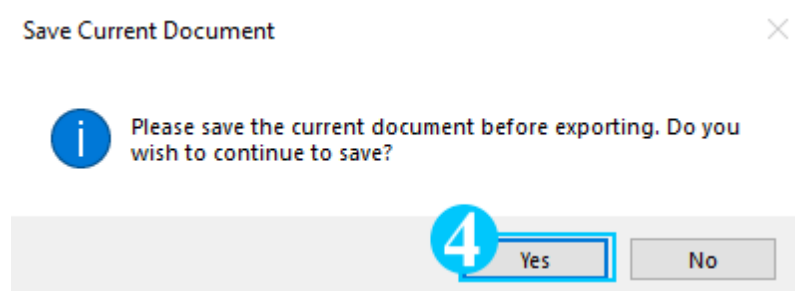
Here are necessary 6 steps:

**Steps 1, 2, 3-) Click References (1) > Export as (2) > Without Mendeley Fields (3).**



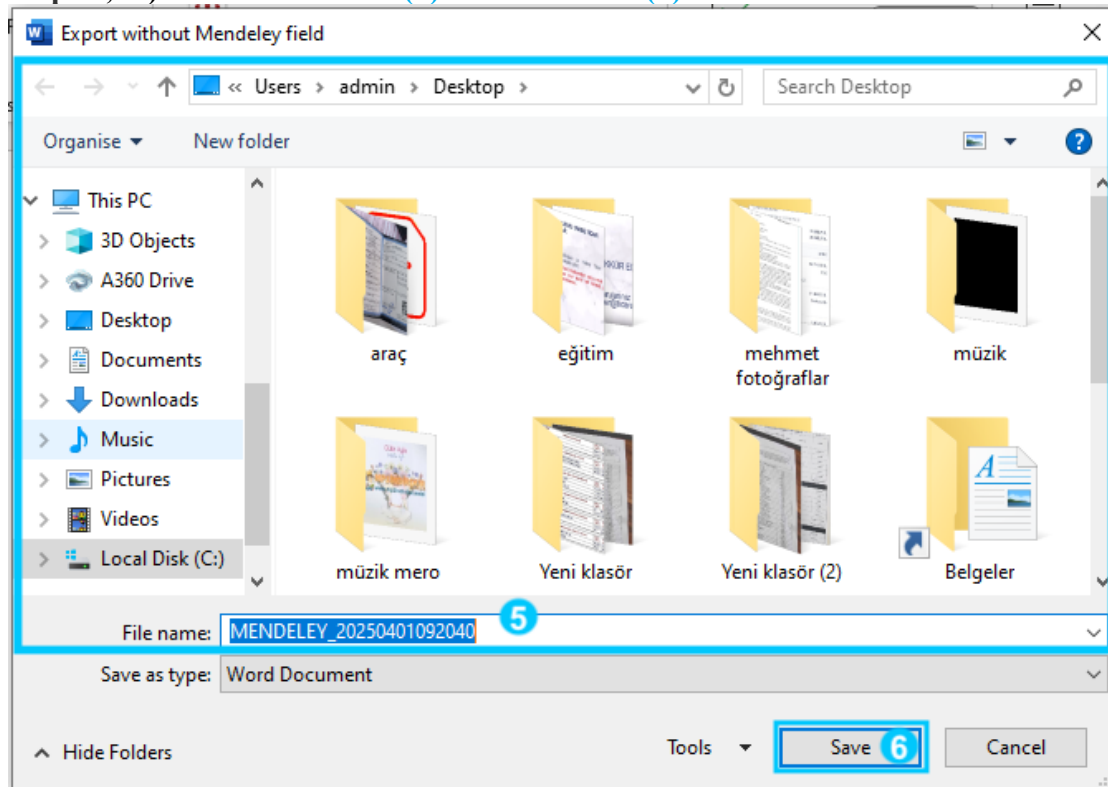
*Screenshot 110 - Converting Citation and Bibliography Fields to Plain Text - 1*

**Step 4-) If prompted to save the document, click Yes (4).**



*Screenshot 111 - Converting Citation and Bibliography Fields to Plain Text - 2*

**Steps 5, 6-) Choose a location (5) and click Save (6).**



*Screenshot 112 - Converting Citation and Bibliography Fields to Plain Text - 3*

The document is now saved without Mendeley fields.

#### d) Choosing, Finding and Editing Citation Styles

A citation style is the system file that formats citation and bibliography content (citationstyles.org, 2024a). It determines how reference details appear in citations and footnotes.

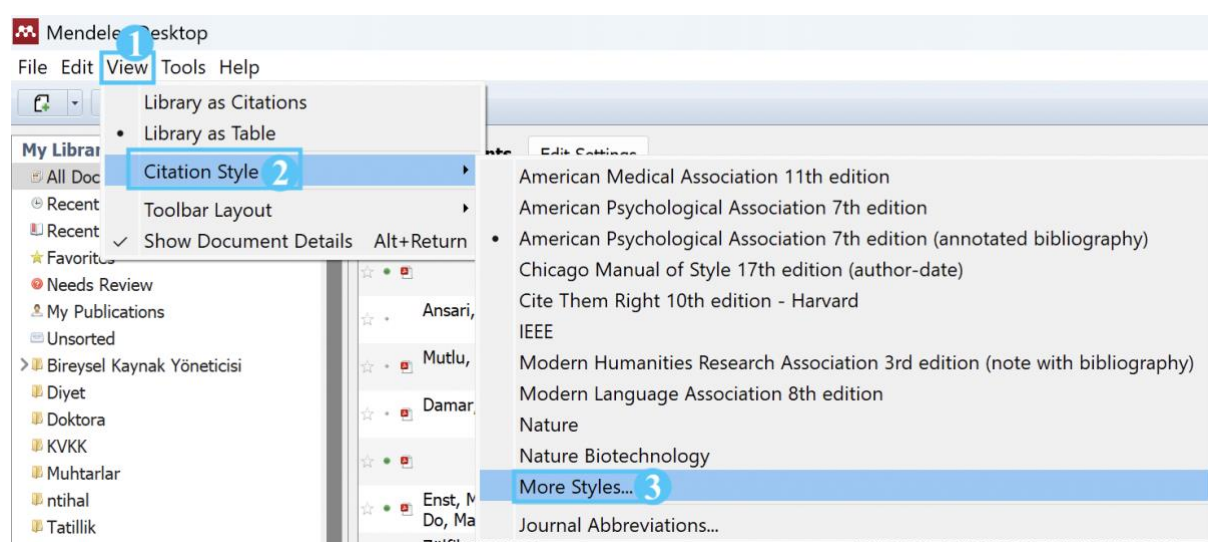
Selecting and Finding Citation Styles: This process is explained in two parts, Selecting Citation Styles Available in the Software and Finding Citation Styles Not Available in the Software.

##### i) Selecting Citation Styles Available in the Software

You can choose a built-in citation style or download a new one if it's not listed.

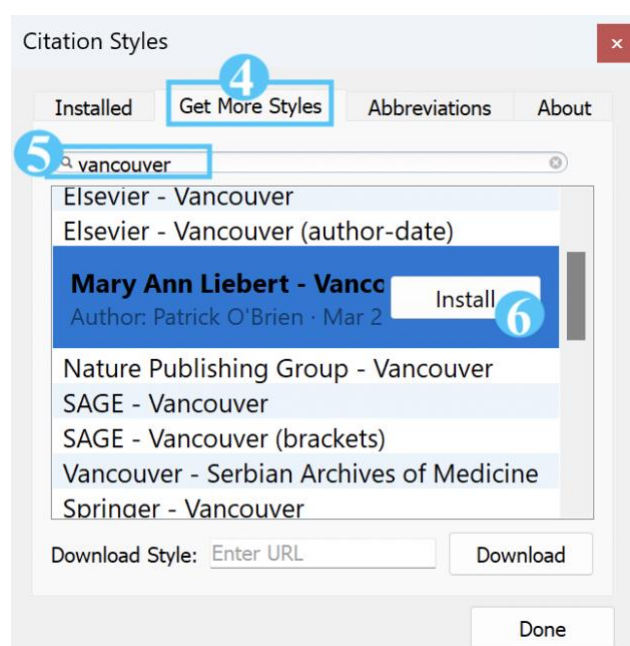
Here are necessary 13 steps:

**Steps 1, 2, 3-)** Click **View (1)** > **Citation Style (2)** and select a style. If not listed, click **More Styles... (3)**.



Screenshot 113 - Choosing Among Available Citation Styles in Mendeley Desktop - 1

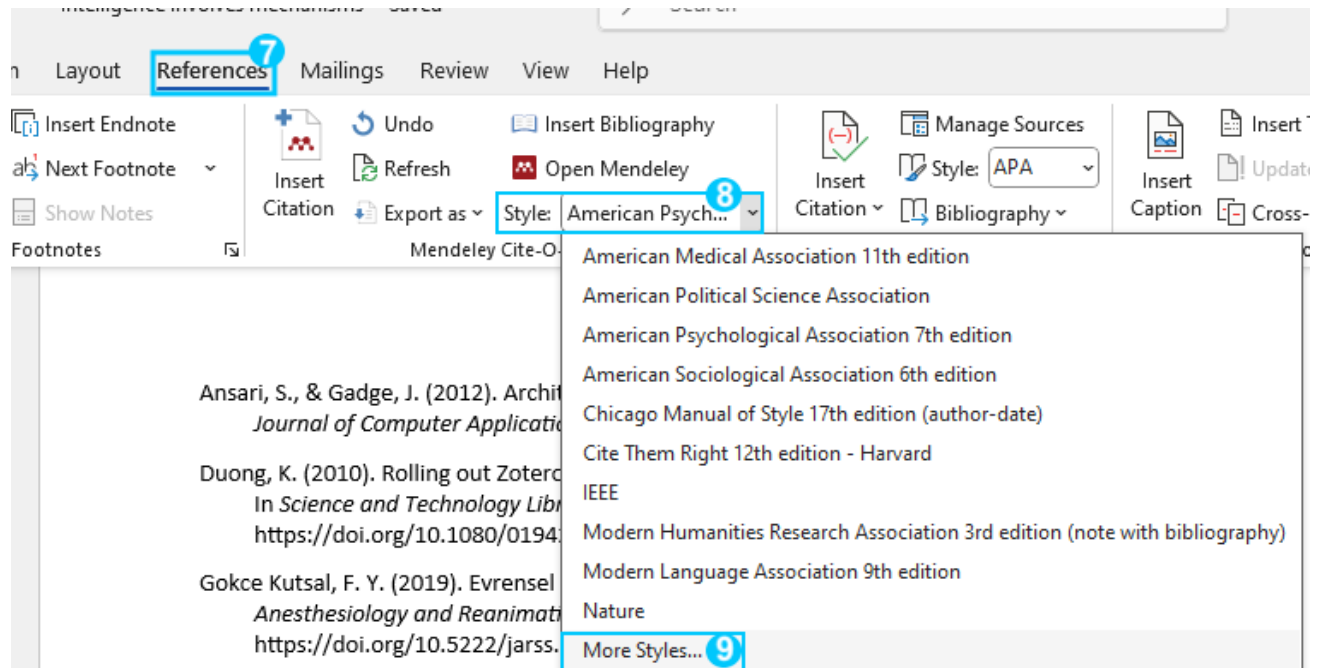
**Steps 4, 5, 6-)** Click on **Get More Styles (4)**, search for the style name **(5)**, and click **Install (6)**.



Screenshot 114 - Choosing Among Available Citation Styles in Mendeley Desktop - 2

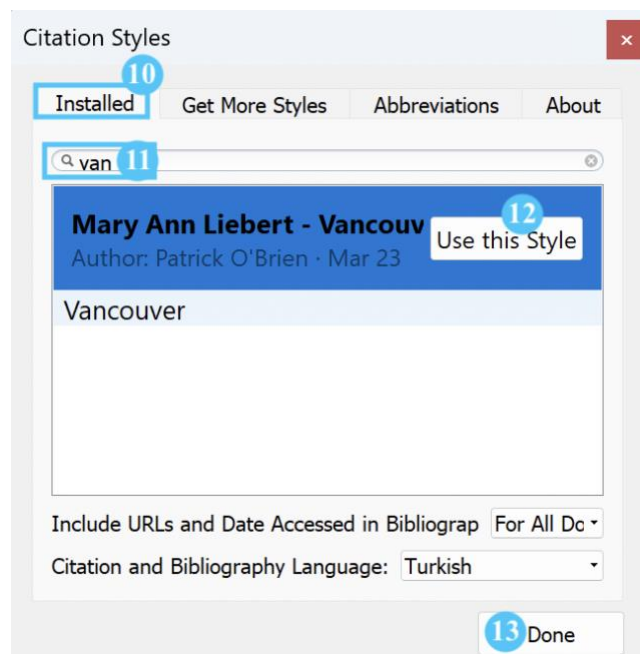
The style is now downloaded.

**Steps 7, 8, 9-)** In the MSWord, go to **References (7) > Style (8) More Styles... (9).**



Screenshot 115 - Choosing Among Available Citation Styles in Mendeley Desktop - 3

**Steps 10, 11, 12, 13-)** Under **Installed (10)**, type the name of the newly installed style **(11)** click **Use this Style (12)** then click **Done (13)**.



Screenshot 116 - Choosing Among Available Citation Styles in Mendeley Desktop - 4

Citation style selection, download, and setup are now complete. (mendeley.com, 2024c).

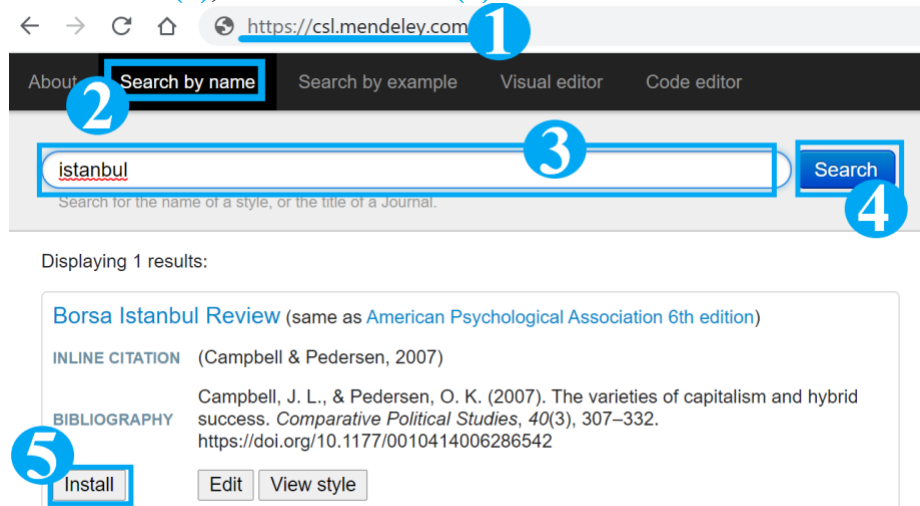
## ii) Citation Style Finding Methods

### 1) Finding Citation Style by Name

*Mendeley* provides a citation style repository at [cs1.mendeley.com](https://cs1.mendeley.com). You can search by style name or example citation to find the desired or closest match.

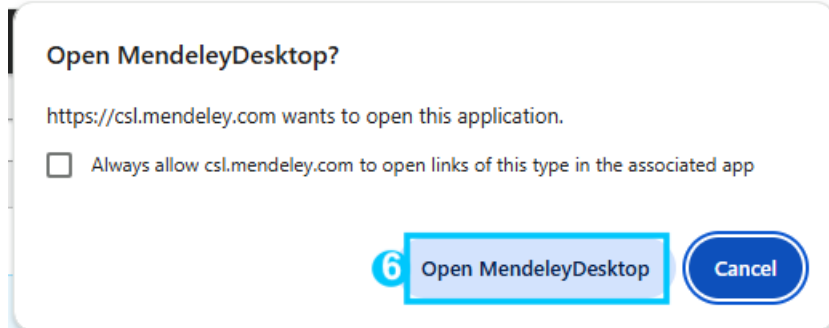
To find a citation style by name (6 steps):

**Steps 1, 2, 3, 4, 5-** Go to [cs1.mendeley.com](https://cs1.mendeley.com) (1), click **Search by name** (2), enter the style name (3), click **Search** (4), then click **Install** (5) next to the desired result.



Screenshot 117 - Finding Citation Style by Citation Style Name - 1

**Steps 6-** Click on **Open MendeleyDesktop** to apply the style (6).



Screenshot 118 - Finding Citation Style by Citation Style Name - 2

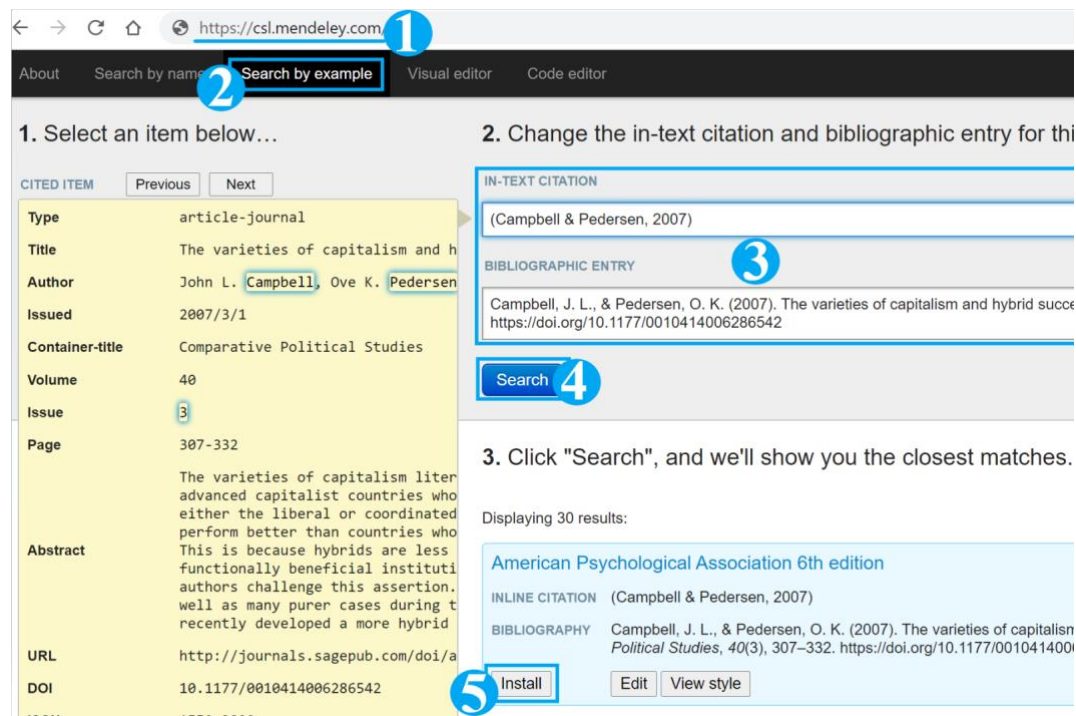
After this stage, activate and use the citation style in *Mendeley Desktop* and MSWord by following the same steps in “i) Selecting Citation Styles Available in the Software”.

### 2) Finding Citation Style by Example

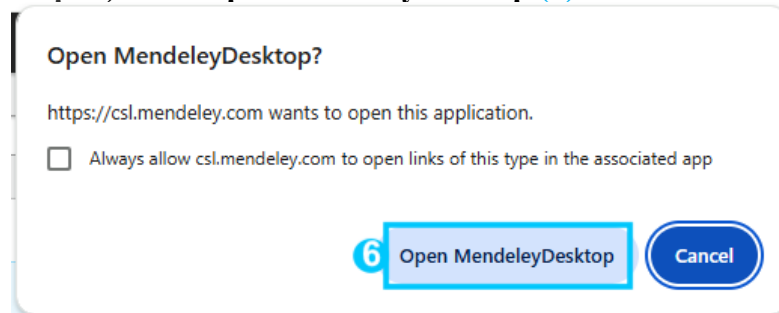
At [cs1.mendeley.com](https://cs1.mendeley.com) you can also find citation styles by entering example citations.

To find a citation style by example (6 steps):

**Steps 1, 2, 3, 4, 5-** Go to [cs1.mendeley.com](https://cs1.mendeley.com) (1). Click **Search by example** (2). Enter a sample citation format (3), click **Search** (4) and then click on **Install** (5) on the desired result.



Screenshot 119 - Finding Citation Style with Citation Style Example - 1

**Step 6-) Click Open MendeleyDesktop (6).**

Screenshot 120 - Finding Citation Style with Citation Style Example - 2

After this, activate the citation style using the same steps from “i) Selecting Citation Styles Available in the Software”.

**iii) Editing the Citation Style File**

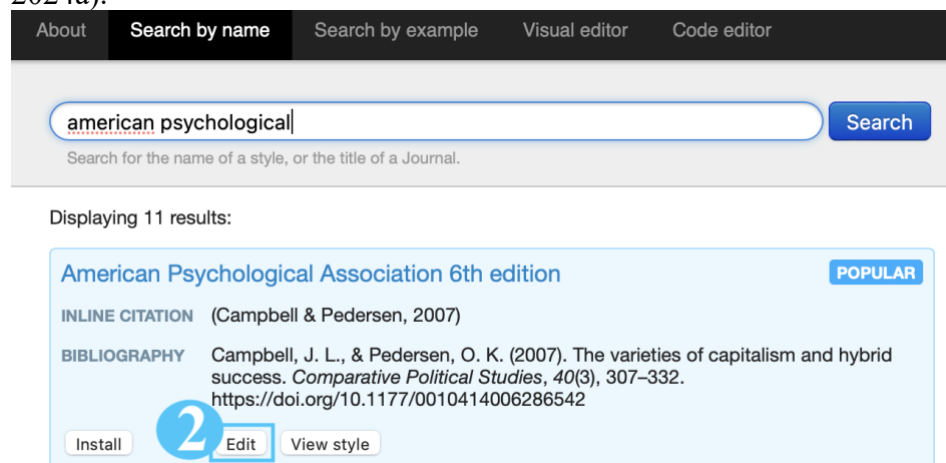
Making changes to an existing citation style, instead of replacing it with a new one, is an advanced process that requires prior knowledge on how to do it. (zotero.org, 2024).

To modify a citation style (8 steps):

**Step 1-) Find the citation style by using the steps in “1) Finding by Citation Style Name” or “2) Finding by Writing a Citation Style by Examples” (1).**



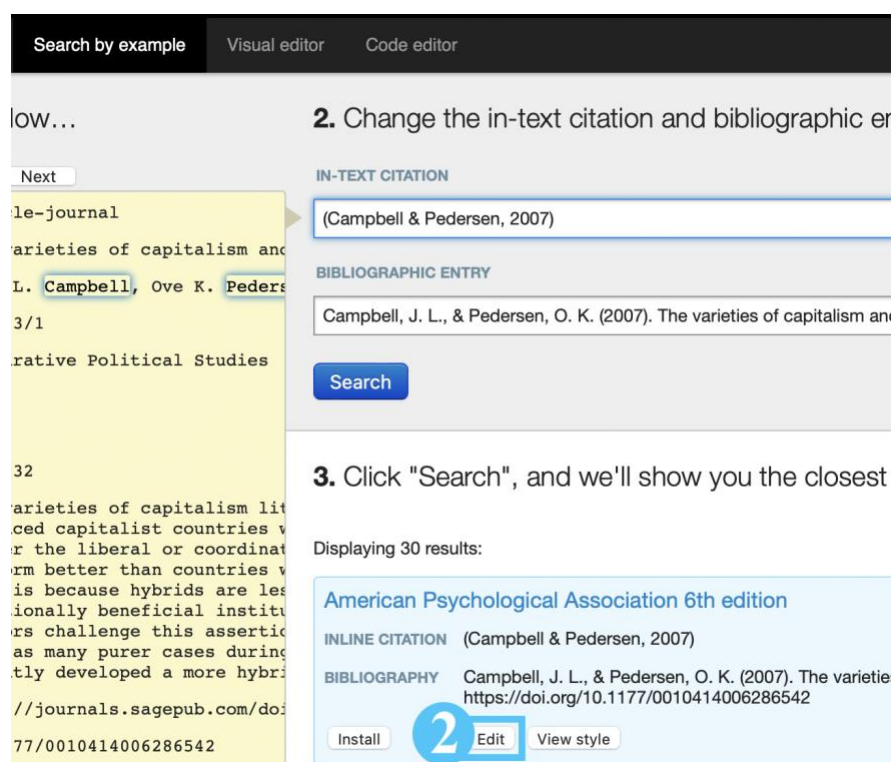
**Step 2-)** Click **Edit (2)** next to the style. (Login to mendeley.com if prompted.) (mendeley.com, 2024a).



Screenshot 121 - Editing the Citation Style File - 1

or

**Step 2-)** On the citation style details page, click **Edit (2)** to open the style editor. (If you are not logged into mendeley.com, you will be prompted to log in.) (mendeley.com, 2024a).



Screenshot 122 - Editing the Citation Style File - 2

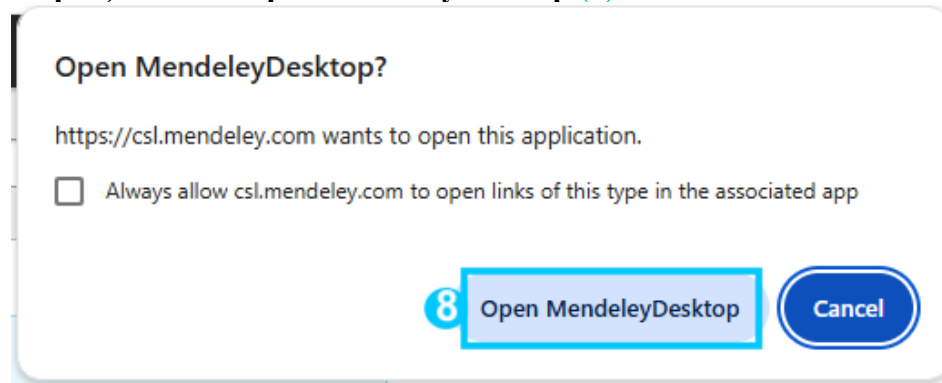
Steps 3, 4, 5-) Choose the section to edit (3), make changes here (4), and preview them (5).

Screenshot 123 - Editing the Citation Style File - 3

Steps 6, 7-) Click Style (6) and then Save Style (7) (mendeley.com, 2024f).

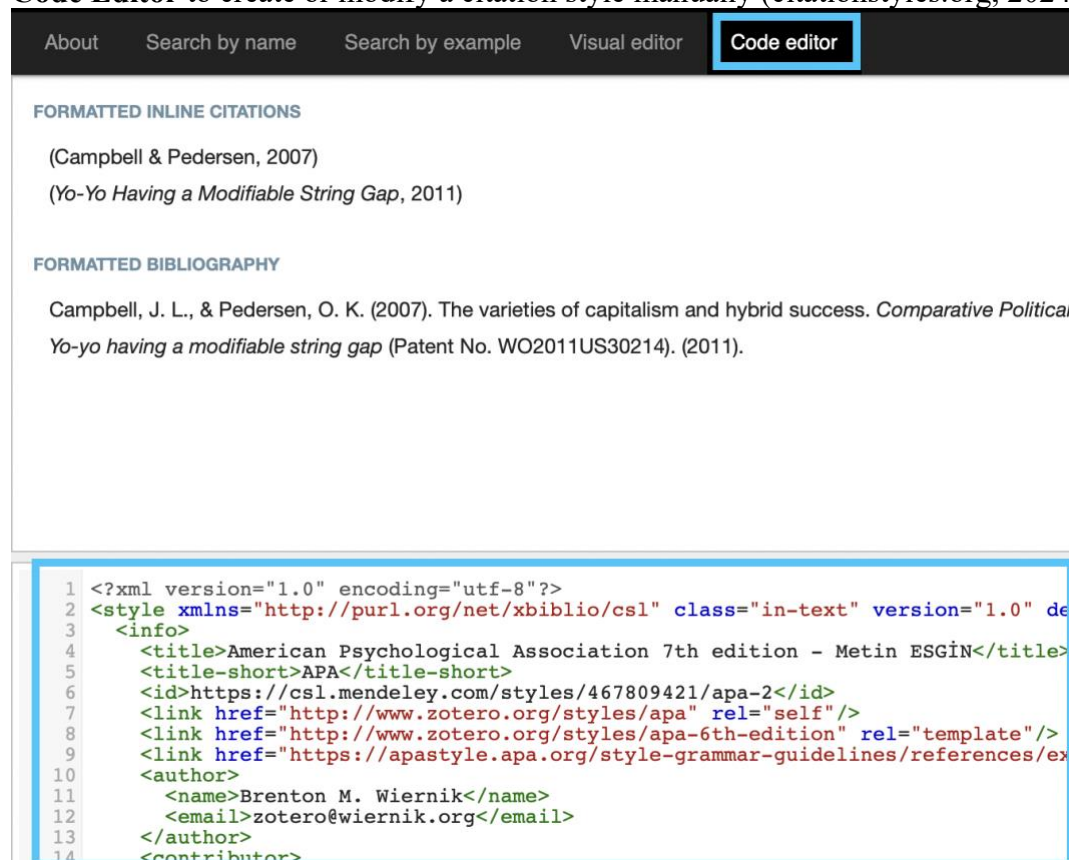
Screenshot 124 - Editing the Citation Style File - 4



**Step 8-) Click on Open MendeleyDesktop (8).**

Screenshot 125 - Editing the Citation Style File - 5

Now you can activate and use this edited style in *Mendeley Desktop* and MS Word by following the steps in “i) Selecting Citation Styles Available in the Software”. Alternatively, you can use the **Code Editor** to create or modify a citation style manually (citationstyles.org, 2024b).



Screenshot 126 - Editing the Citation Style File - 6

If a suitable style is not found among the 10,000+ available on [csl.mendeley.com](https://csl.mendeley.com) you can:

- Create a style from scratch
- Or modify an existing one using:
  - [csl.mendeley.com](https://csl.mendeley.com) (created by *Mendeley*)
  - [editor.citationstyles.org](https://editor.citationstyles.org) (joint venture)
  - [www.zotero.org/styles](https://www.zotero.org/styles) (is maintained by volunteers led by George Mason University)

All three use CSL (Citation Style Language) and are compatible across multiple reference managers.

Creating a style from scratch is time-consuming. It's recommended to find a similar style and edit it instead. The section titled “iii) Editing the Citation Style File” briefly covers the basics of modifying a citation style file.

## V. REFERENCE MANAGER TOOLS

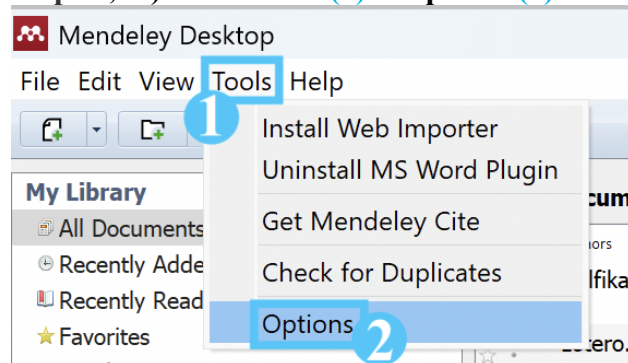
### a) Automatically Name and Folder PDFs

#### i) Mendeley File Organizer

This feature renames and organizes PDF files from your *Mendeley Desktop* library into folders on your computer based on criteria like journal name, title, author, or publication year. For it to work correctly, the reference data in *Mendeley Desktop* must be accurate.

To use *File Organizer* (13 steps):

**Steps 1, 2-) Click Tools (1) > Options (2).**



Screenshot 127 – Mendeley Desktop File Organizer - 1

**Steps 3, 4-) Go to the File Organizer (3) tab. Check the Organise my files (4). Click Browse (5) to select the folder on your computer where Mendeley will save and organize PDF files.**

### SORTING PDF FILES INTO FOLDERS

**Steps 6, 7, 8-) To organize PDFs into folders based on specific criteria:**

Check the **Sort files into subfolders (6)** box.

Drag any unused fields to the **Unused fields (7)** section.

Drag the desired sorting criteria to the **Folder path (8)** section in your preferred order.

Folders will be created based on these criteria, starting from the left, forming a nested folder structure.

### NAMING PDF FILES

**Steps 9, 10, 11, 12-) To rename PDFs:**

Check the **Rename document files (9)** box.

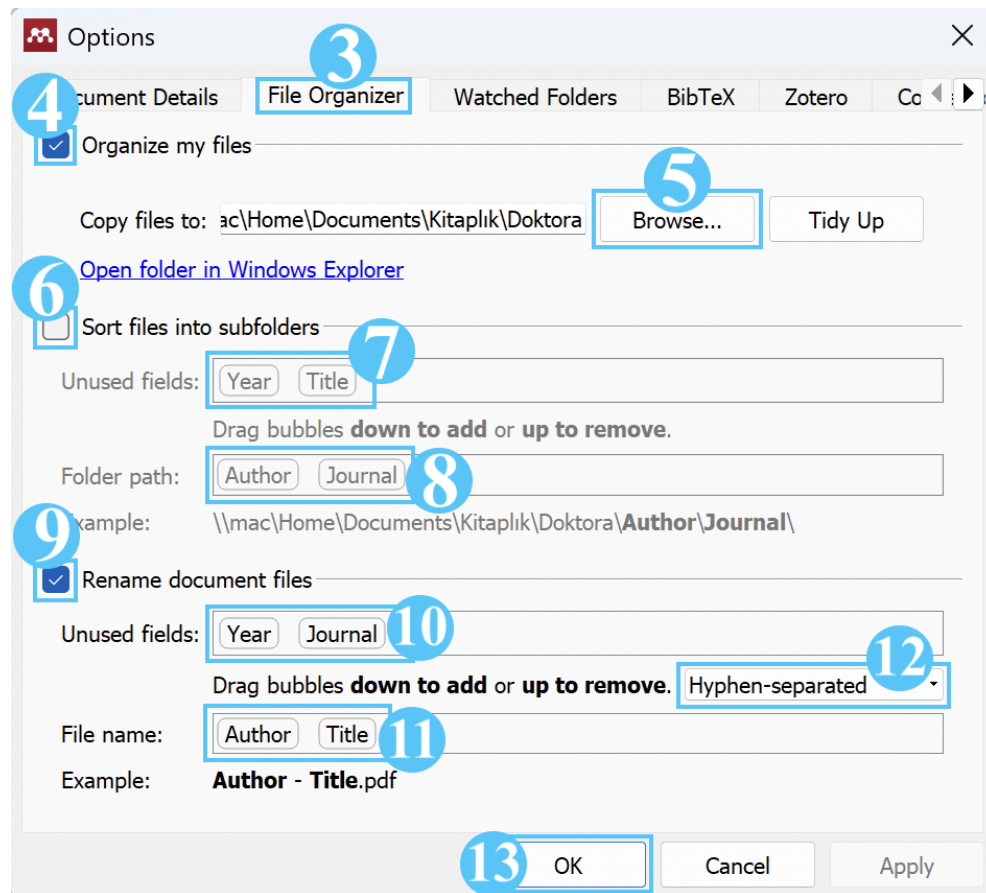
Drag unused fields to the **Unused fields (10)** section.

Drag the desired naming criteria to the **File name (11)** section in the preferred order.

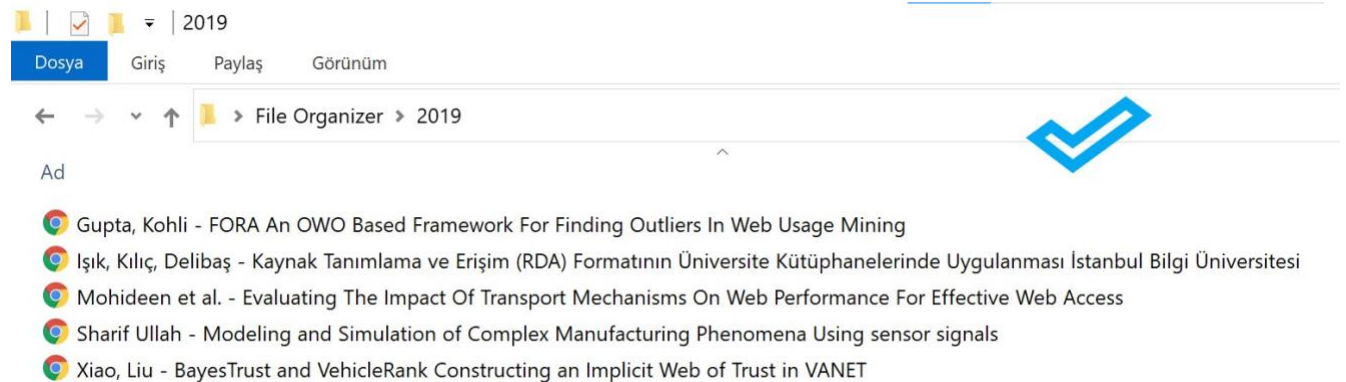
The order determines how the file name is structured from left to right.

Choose any character or symbol to include between the naming elements (12).

**Step 13-) Click OK (13).**



Screenshot 128 - Mendeley Desktop File Organizer - 2



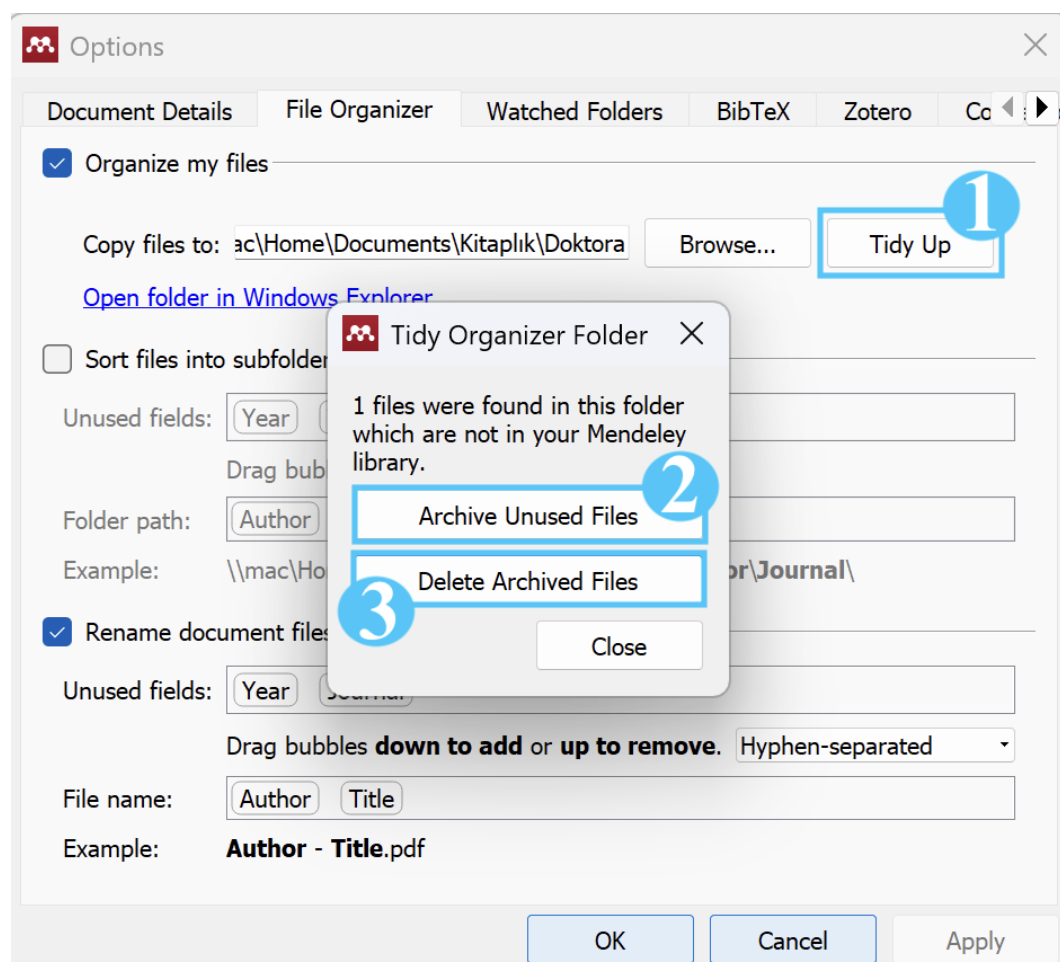
Screenshot 129 - Mendeley Desktop File Organizer - 3

PDF files will now be automatically renamed and sorted into folders based on your selected settings.

## TIDY UP

**Steps 1, 2-)** Click **Tidy Up** (1) to see how many files exist in the *File Organizer* folder but are not listed in your *Mendeley* library. Use **Archive Unused Files** (2) to move these unlisted files to an Archive folder within the *File Organizer* folder. These are files deleted from *Mendeley Desktop* but still present on your computer.

**Step 3-)** Click **Delete Archive Files** (3) to permanently remove the archived files both from the Archive folder and your computer, as they are no longer part of your *Mendeley Desktop* library.



Screenshot 130 - Mendeley Desktop File Organizer - 4

## b) Synchronize Mendeley Desktop with Local Folders

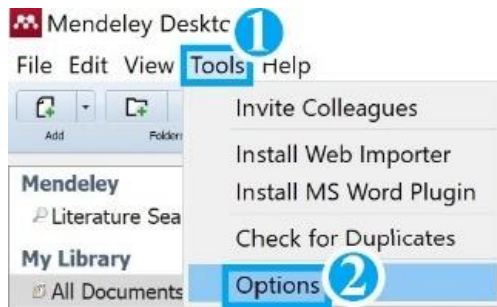
### i) Mendeley Watched Folders

With the *Mendeley Watched Folders* function; PDF files placed in folders designated as *Watched Folders* on the computer are automatically added to the *Mendeley* library. The bibliographic data of the added file is automatically defined by *Mendeley Desktop*; however, the accuracy of the automatically defined bibliographic data must be checked.

This feature works like a cloud drive. When PDF files are added to *Watched Folders*, they're automatically imported into the *Mendeley* library. *Mendeley* tries to extract bibliographic data, but the imported details should be reviewed for accuracy.

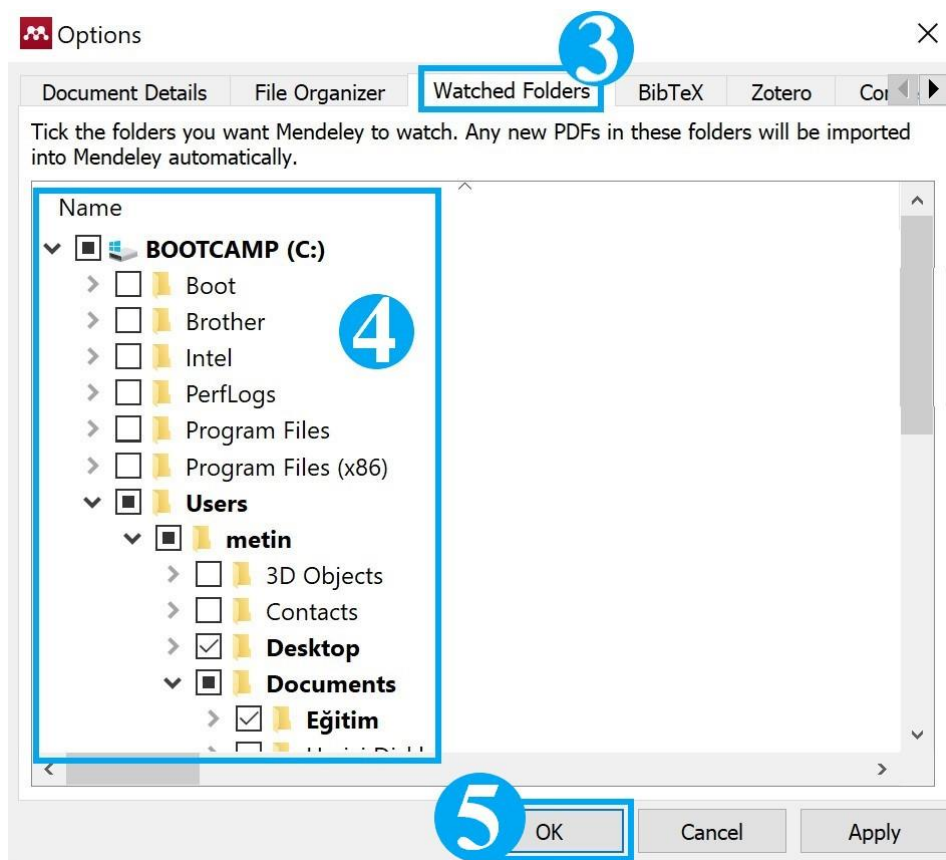
To activate *Watched Folders* (5 steps):

Steps 1, 2-) Click **Tools (1)** > **Options (2)**.



Screenshot 131 - Mendeley Desktop Watched Folders - 1

Steps 3, 4, 5-) Select **Watched Folders (3)**, choose the folder(s) you want *Mendeley* to monitor (4) then click **OK (5)**.



Screenshot 132 - Mendeley Desktop Watched Folders - 2

*Watched Folders* is now active.

## c) Software's Own Databases

i) *Mendeley Web Catalogue*

Mendeley offers a reference database called the *Mendeley Web Catalogue*, accessible at [mendeley.com](https://mendeley.com) after logging in with your username and password (mendeley.com, 2020).

## Welcome to Mendeley

Search for and add articles to your library

 × Search

Try: [COVID-19](#) | [Bioenergy](#) | [Obesity](#) | [Intrinsic Motivation](#)

Screenshot 133 - Mendeley Web Catalogue

ii) *Mendeley Datasets*

Datasets with research data are available through [data.mendeley.com](https://data.mendeley.com) (mendeley.com, 2024e).



Mendeley Data



[Sign In / Register](#)

## Share your research data

Mendeley Data is a free and secure cloud-based communal repository where you can store your data, ensuring it is easy to share, access and cite, wherever you are.

[Create a Dataset](#)

Find out more about our institutional offering, [Digital Commons Data](#)

### Search the repository

 Q

[Advanced search](#)

Search results powered by Data Monitor

### Recently published

#### Riverine Plastic Litter Dataset

Zhang, Cheng, Xu, Xiaohan, Xia, Yunfei  
Published 11 October 2024 | Mendeley Data

A dataset of floating plastic litter in river was established, including five types of images: plastic bags, plastic bottles, plastic boxes, plastic cups, and cans. Originated in the Research Lab of Automation in Construction Engineering and Management (ACEM), Department of Civil Engineering, Xi'an Jiaotong-Liverpool University

[Dataset](#)

Export: [APA](#) | [BibTeX](#) | [DataCite](#) | [RIS](#)



### The Generalist Repository Ecosystem Initiative

Elsevier's Mendeley Data repository is a participating member of the National Institutes of Health (NIH) Office of Data Science Strategy (ODSS) GREI project. The GREI includes seven established generalist repositories funded by the NIH to work together to establish consistent metadata, develop use cases for data sharing, train and educate researchers on FAIR data and the importance of data sharing, and more.

[Find out more](#)

Screenshot 134 - Mendeley Datasets

## VI. FOR SYSTEM ADMINISTRATORS

Bibliography managers are generally user-friendly, but expert support may be required in some cases (Mendeley.com, 2024b). Below are essential checks for administrators assisting users with potential problems.

### a) Check Points

#### i) Update Control

To ensure smooth performance of the bibliography management software and its plugins, regularly update the followings:

- Bibliography management software (*Mendeley* etc.)
- Operating System (Windows / MacOS etc.)
- Word processing software (MSWord / OpenOffice etc.)
- Internet browser (Chrome, Safari etc.)

#### ii) Citation Styles for Scientific Fields

Citation styles are often defined by journals, institutions, or publishers and can vary widely. Standard users may struggle to locate the exact required style. Offering guidance and support can help overcome this challenge. The instructions in this guide on finding and editing citation styles can assist in resolving these issues.



## VII. SAMPLE BIBLIOGRAPHIES

Sample bibliographies for commonly referenced publication types—such as authored book, edited book chapter, scientific journal article, webpage, open educational resource, and x post—are provided below.

**Authored Book** : Levenson, H., Jinich, S., Vaz, A., & Rousmaniere, T. (2025). *Deliberate practice in emotionally focused couple therapy*. American Psychological Association. <https://doi.org/10.1037/0000436-000>

**Edited Book Chapter** : Zeleke, W. A., Hughes, T. L., & Drozda, N. (2020). Home–school collaboration to promote mind–body health. In C. Maykel & M. A. Bray (Eds.), *Promoting mind–body health in schools: Interventions for mental health professionals* (pp. 11–26). American Psychological Association. <https://doi.org/10.1037/0000157-002>

**Scientific Journal Article** : Edwards, A. A., Steacy, L. M., Siegelman, N., Rigobon, V. M., Kearns, D. M., Rueckl, J. G., & Compton, D. L. (2022). Unpacking the unique relationship between set for variability and word reading development: Examining word- and child-level predictors of performance. *Journal of Educational Psychology*, 114(6), 1242–1256. <https://doi.org/10.1037/edu0000696>

**Open Educational Resource** : Fagan, J. (2024, February 7). *Nursing clinical brain*. OER Commons. Retrieved April 8, 2025, from <https://www.oercommons.org/authoring/53029-nursing-clinical-brain/view>

**Webpage** : Taras, Z. (2024, May 30). *Situational irony can be funny, tragic or even terrifying*. howstuffworks. <https://entertainment.howstuffworks.com/arts/literature/situational-irony.htm>

**X Post** : Obama, B. [@BarackObama]. (2024, May 17). *Today marks 70 years since the Supreme Court handed down its landmark decision in Brown v. Board of Education, outlawing [Post]*. X. <https://x.com/BarackObama/status/1791540592238874953> (Giuliano, 2024).

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- zotero.org. (2024). *dev:citation\_styles:style\_editing\_step-by-step [Zotero documentation]*. zotero.org. [https://www.zotero.org/support/dev/citation\\_styles/style\\_editing\\_step-by-step](https://www.zotero.org/support/dev/citation_styles/style_editing_step-by-step)

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